

HAWAI'I STATE PARKS SURVEY

Prepared for:



Natural Resources Program

February 2004



OmniTrak Group Inc.

Davies Pacific Center 1150, 841 Bishop Street, Honolulu, Hawaii 96813
Telephone: 1-808-528-4050; Fax: 1-808-538-6227;
E-mail: omnitrak@omnitrakgroup.com

Table of Contents

	<u>PAGE</u>
PRIMARY OBJECTIVES	3
SAMPLE PLAN	4
METHODOLOGY	5
EXECUTIVE HIGHLIGHTS	6-8
RECOMMENDATIONS	9
PARK UTILIZATION	10-17
PARK USER MIX	18-40
PROFILE OF PARK USERS	41-51
MOTIVATIONAL ANALYSIS	52-62
BEHAVIORAL ANALYSIS	63-70
SATISFACTION WITH PARK EXPERIENCE	71-79



Primary Objectives

- To estimate the number of people who use/ visit State Parks.
- To identify park user mix by point of origin.
 - Hawai'i
 - Mainland
 - Japan
 - Other
- To evaluate behavior and attitudes, especially satisfaction.



Sample Plan

- Visits vary by day of week, time of day
- Each park visited at least multiple times

ISLAND	COUNTS
All	Light = 1 – 2 visits/ month
O'AHU	Heavy = 7 visits/ month
HAWAI'I ISLAND	Heavy = 4 visits/ month
MAUI	Heavy = 4 visits/ month
KAUA'I	Heavy = 5 visits/ month

- Completed questionnaires exceeded target by 19%.
 - 11,658 vs. 9,750



Methodology

- **Field work period reporting: July 26, 2003 to January 15, 2004.**
- **In-person counts of visitors to park.**
- **In-person distribution and collection of self-administered surveys.**
- **In-person audit of facility during first visit.**



Executive Highlights (1 of 3)

1. PARK UTILIZATION & USER MIX

- **Hawai'i State Parks are visited by an estimated 9.2 million park go-ers throughout the year.**
- **While the mix varies by Island, the user mix statewide is 69% out-of-state visitor (6.3 million) and 31% resident (2.9 million). This mix is similar on O'ahu, the Hawai'i Island, and Maui. On Kaua'i, however, visitors exceeded residents by more than 6:1 (87% vs. 13%).**
- **The five most popular State Parks: Nu'uuanu Pali, Hā'ena, Diamond Head, Wailua River, and Nā Pali, host mostly out-of-state visitors.**
- **O'ahu holds a 40% share of State Park visitors, followed by Kaua'i with 33%, Maui with 17%, and the Hawai'i Island with 10%.**
- **Among the 69% of park users who are out-of-state visitors, almost 9 in 10 are from North America. This mix, however, may be skewed by record low Japanese arrivals in 2003.**



Executive Highlights (2 of 3)

2. PARK MOTIVATORS & BEHAVIOR

- The purpose for park visits differ by segment. While residents primarily go to parks as a family outing, out-of-state visitors go for outings as well as for the scenic views.
- Besides scenery and outings, park motivators differ by Island: On O'ahu, the secondary purpose is to see a famous landmark; on the Hawai'i Island and Maui, ocean activities are the attraction; and on Kaua'i, hiking and walking.
- While at the park, out-of-state visitors tend to engage in photography, hiking, and walking. Twice as many resident park go-ers versus visitors participate in ocean or water activities.
- Park users rely on printed books, magazines, and brochures as well as inter-personal communications for park information. The travel trade reaches an estimated 15% of park go-ers who are out-of-state visitors.



Executive Highlights (3 of 3)

3. SATISFACTION

- **Satisfaction with State Parks is high overall, with an average score of 8.5 on a 10-point rating scale.**
- **Out-of-state visitors are more satisfied overall than residents on the Hawai'i Island and Kaua'i.**
- **Among all park go-ers, satisfaction is highest on natural resource attributes and lowest on facilities. In particular, park users are dissatisfied with restrooms and food concessions (including availability).**
- **Park security also rates relatively low among the attributes tested.**
- **Park users appreciate interpretive and directional signage, and satisfaction in these areas is moderate.**



Recommendations

1. Increase awareness of park facilities and amenities through a centralized and promoted park information site.
2. Invest in State Park facilities, particularly restrooms. Because of high dissatisfaction, there may be an opportunity for a mix of paid and free facilities.
3. Review security because this could become a serious problem. In particular, laws on homeless camping, drugs, and drinking in State Parks require stronger enforcement.
4. Review food concession quality and availability (particularly in high utilization but remote parks) as a potential revenue source.
5. Develop an island by island rather than statewide strategy because visit purposes and behavior show differences by Island.
6. Consider a bi-annual update (every two years) of this study, given the growing interest in eco-tourism globally.

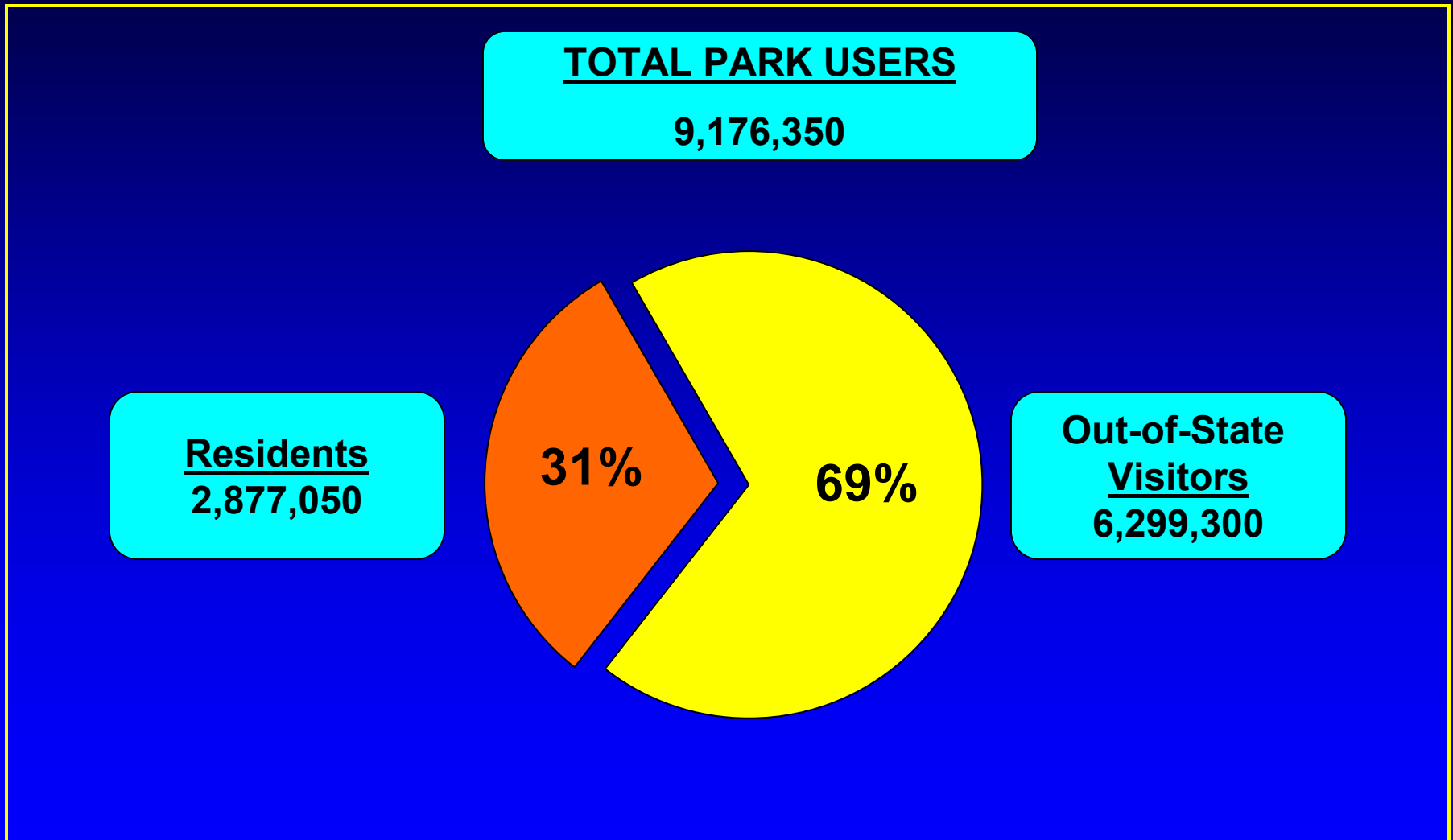


PARK UTILIZATION



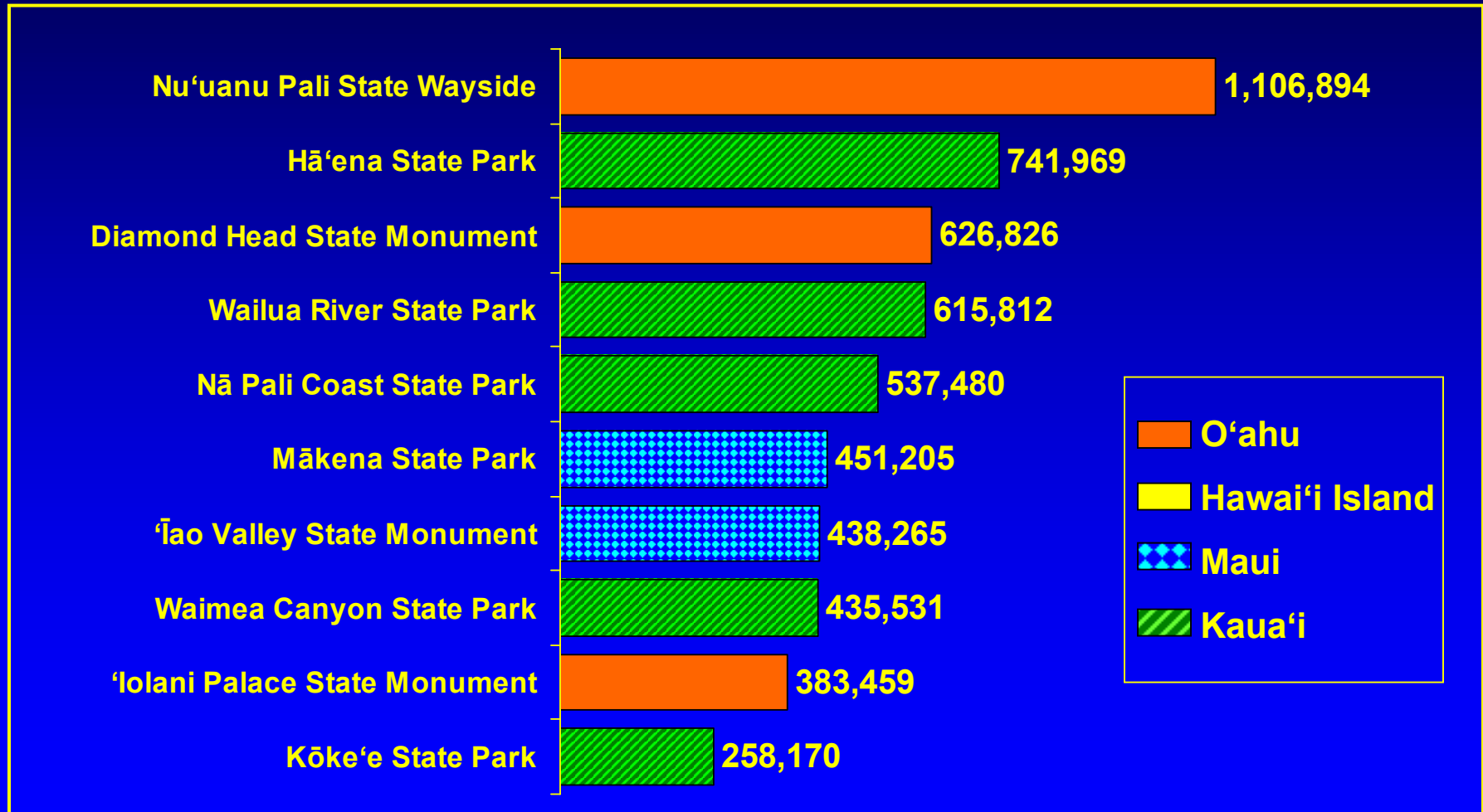
Total Park User Counts

An estimated 9.2 million people visit Hawai'i State Parks each year. Of this total, an estimated 69% or 6.3 million are visitors, while 31% or 2.9 million are residents.

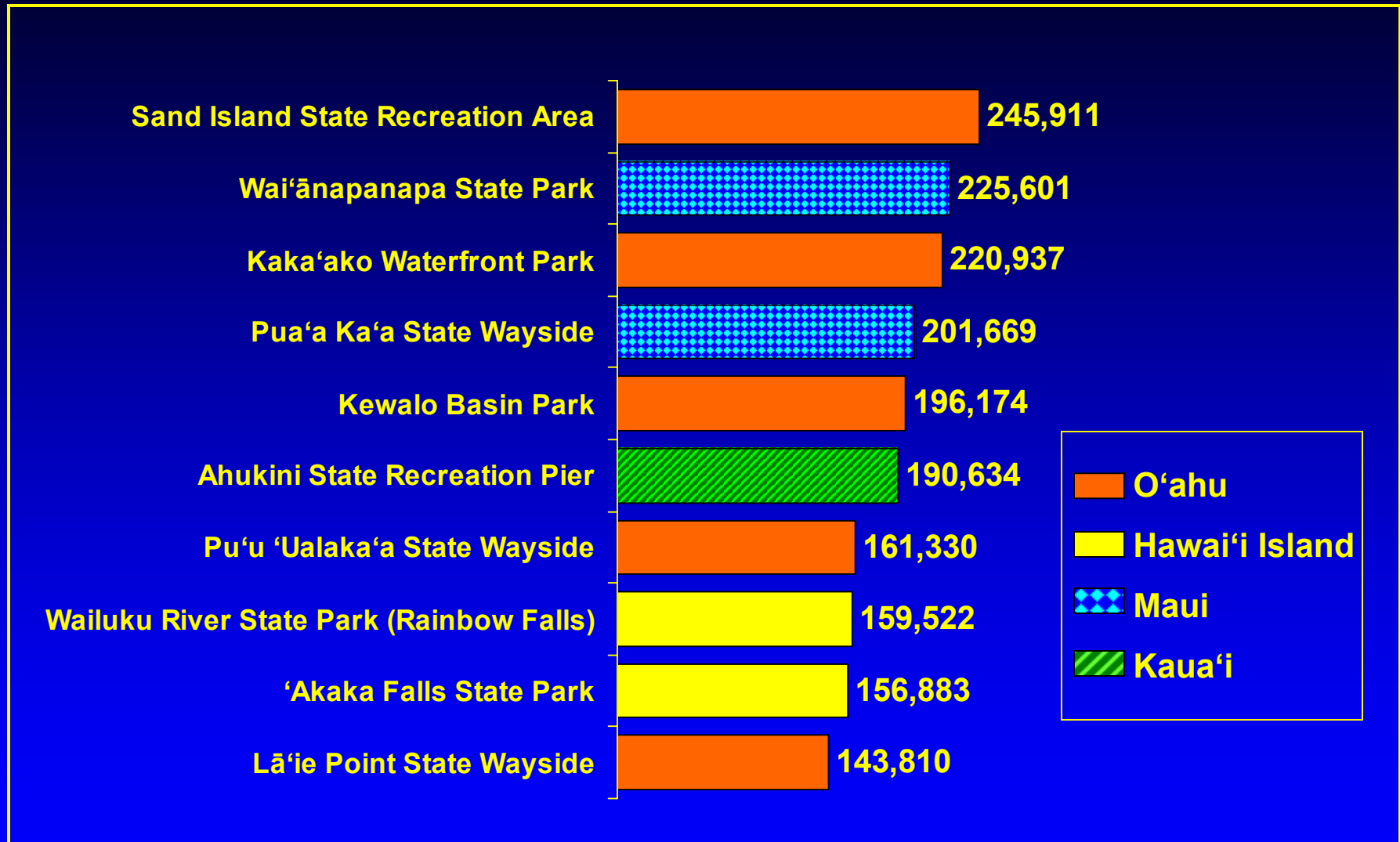


Utilization by Park (1 of 5)

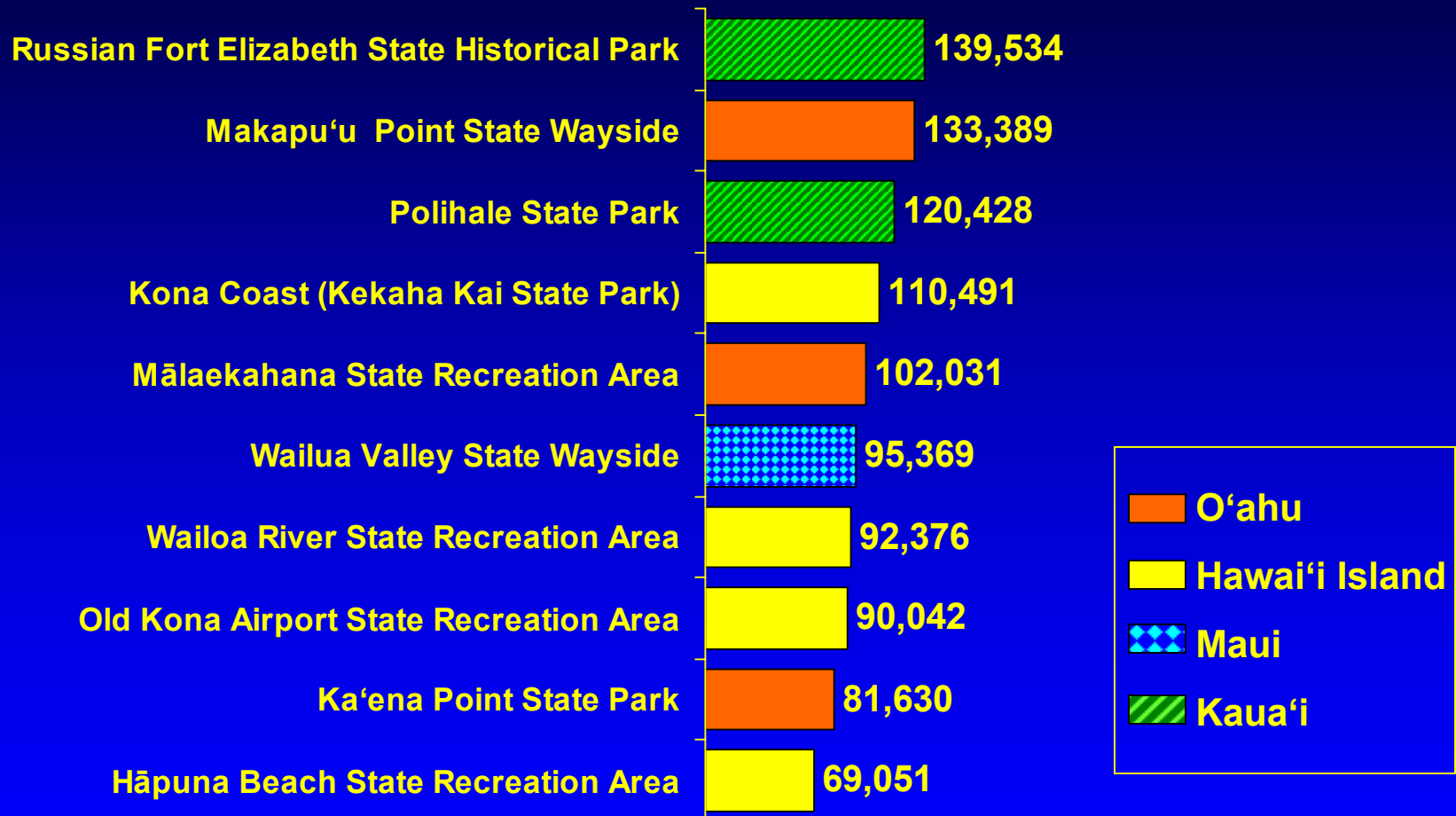
Nuʻuanu Pali State Wayside has the most users at an estimated 1.1 million. This volume is driven by bus tours, virtually all of which stop at the Pali. Hāʻena State Park ranks second with more than 700,000 users. Diamond Head State Monument and Wailua River State Park ranks third and fourth with more than 600,000 users. The next most utilized park is Nā Pali Coast State Park, which has more than 500,000 users. Mākena State Park is the most popular State Park on Maui, again largely due to bus tours.



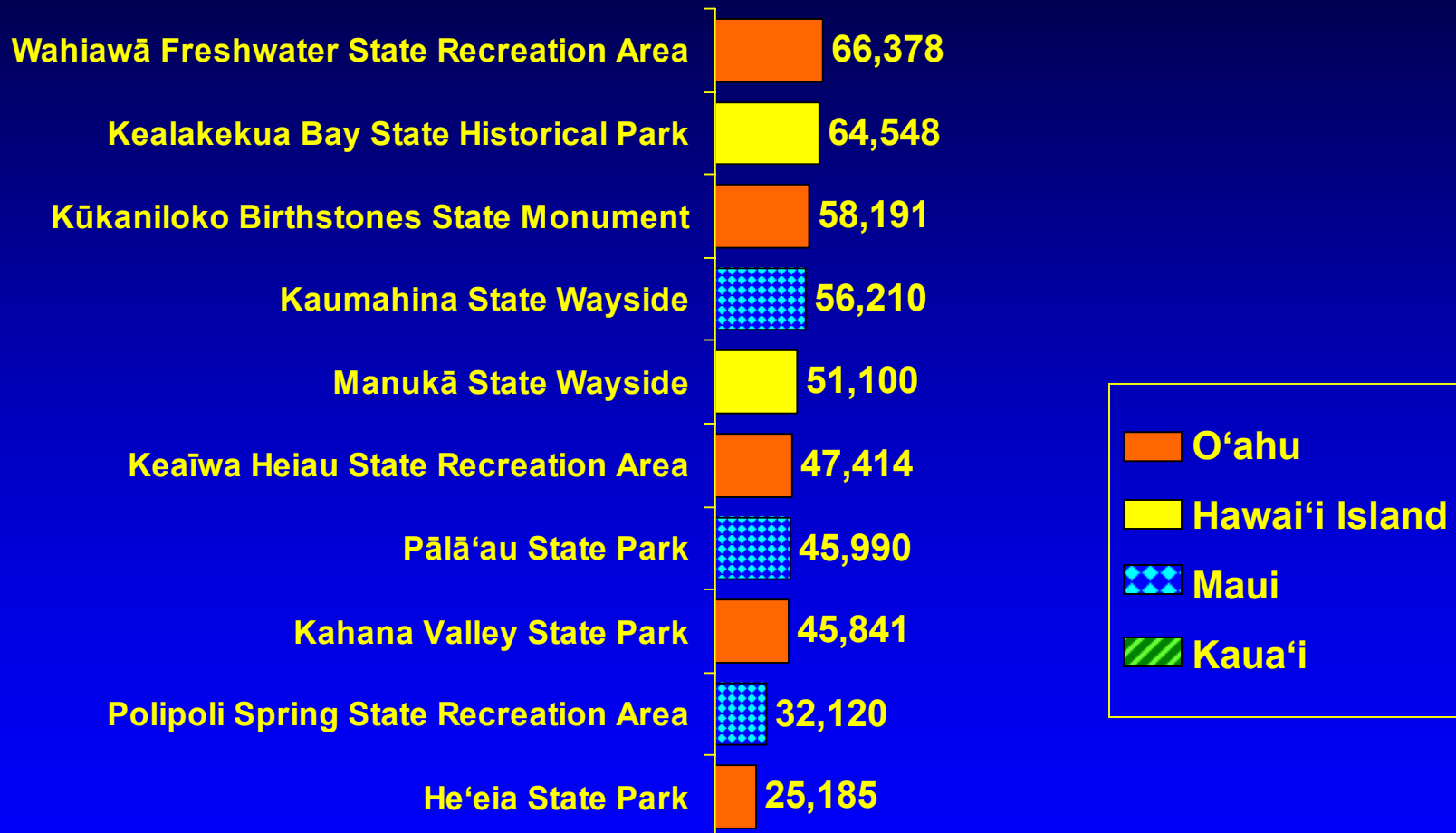
Utilization by Park (2 of 5)



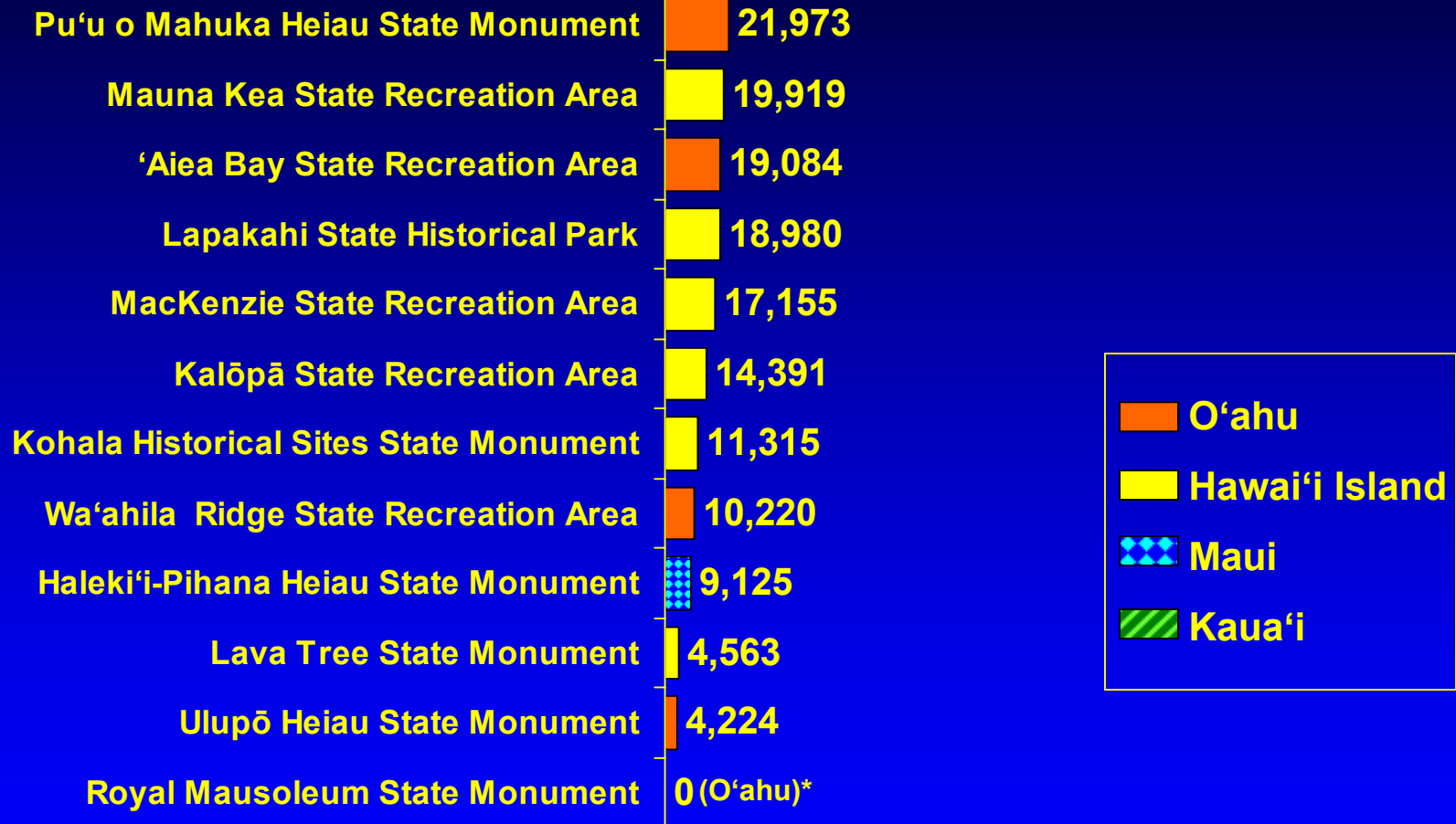
Utilization by Park (3 of 5)



Utilization by Park (4 of 5)



Utilization by Park (5 of 5)

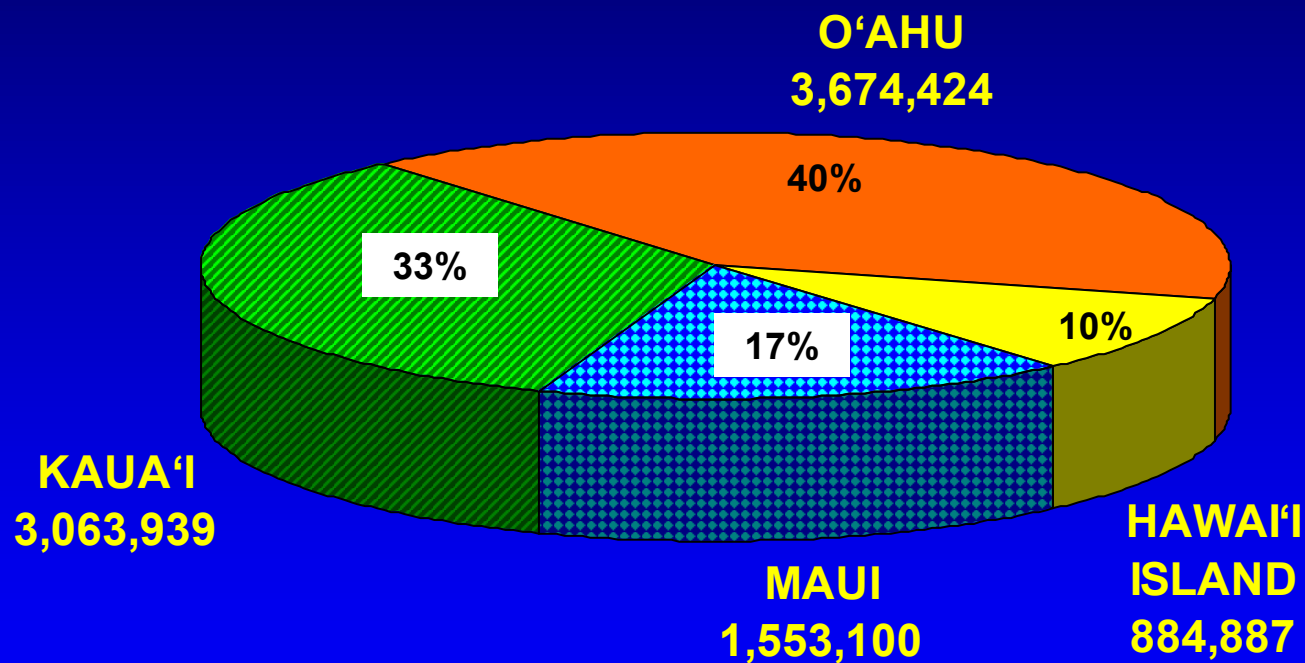


Note: * 3 interviewing shifts, zero count.



Share of Park Users (By Island)

O'ahu holds an estimated 40% share of park users. This is not surprising given the fact that O'ahu is home to 21 of 54 State Parks. Kaua'i has an estimated 33% of park users, followed by 17% on Maui and 10% on the Hawai'i Island.

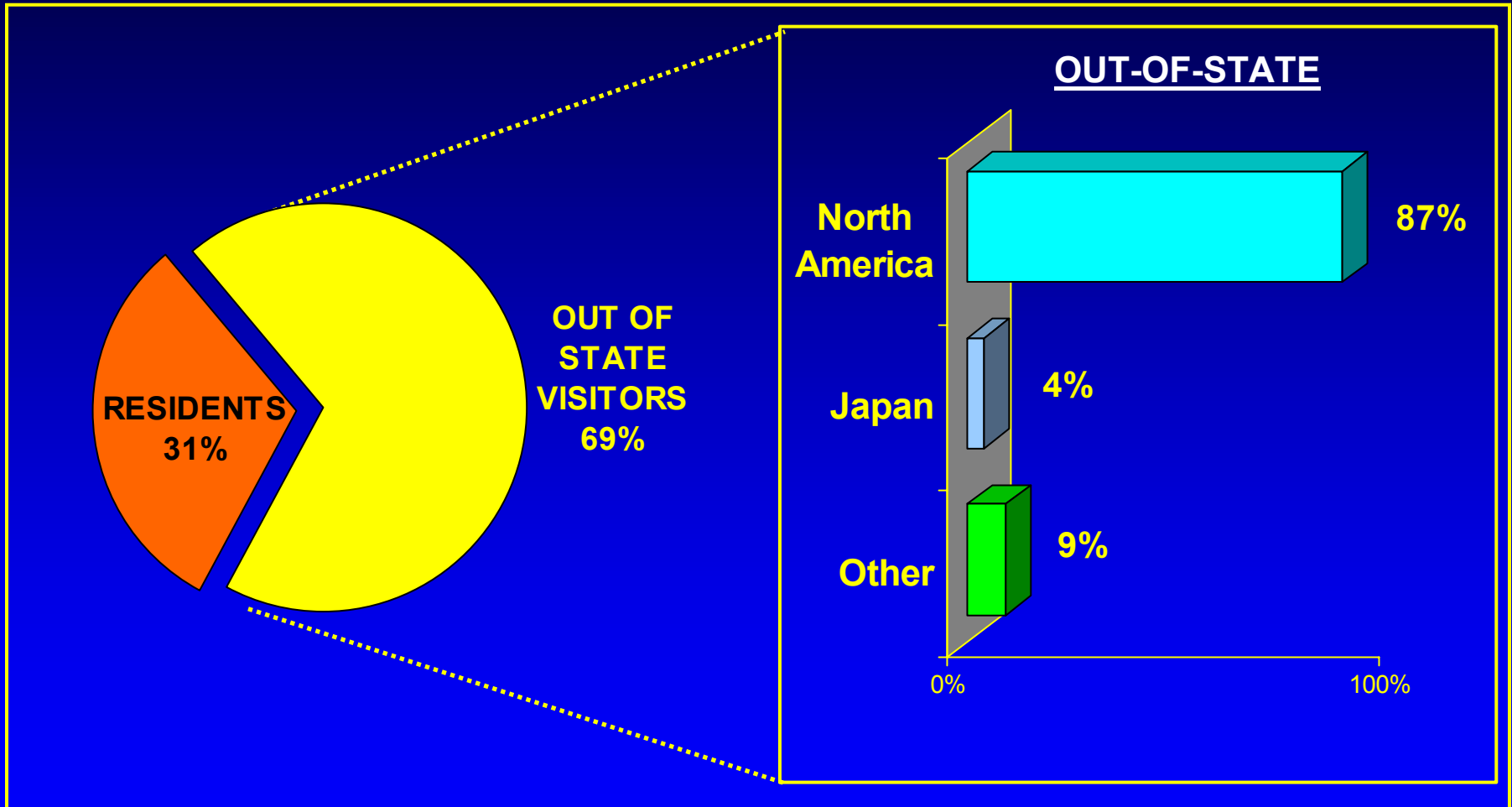


PARK USER MIX



Statewide User Mix

Of the more than 2 in 3 State Park users who reside out-of-state, the vast majority (87%) are from North America. Japanese visitors represent 4% of out-of-state users, with the balance from other areas.



Base: 11658

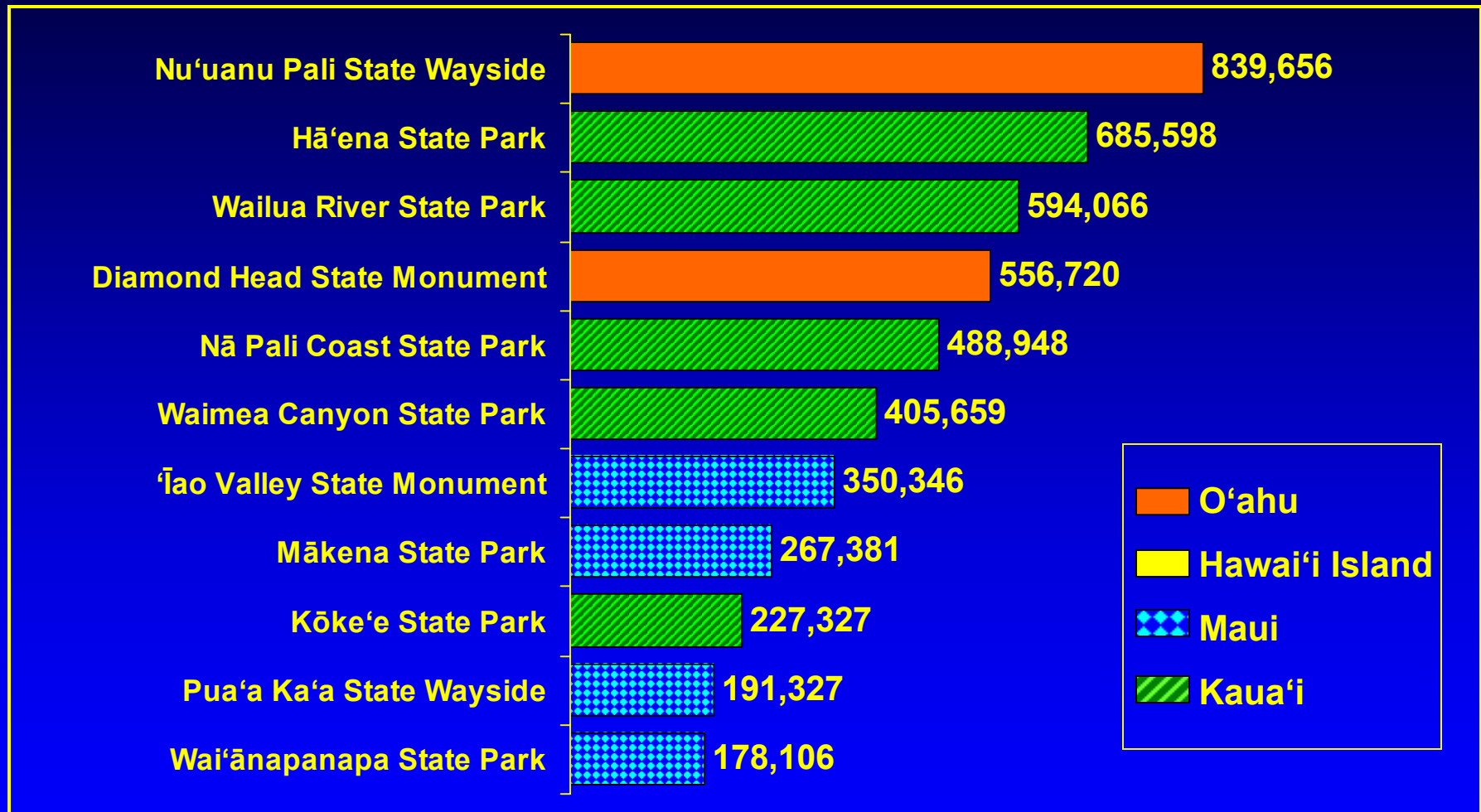
Q1: What is your country of residence?



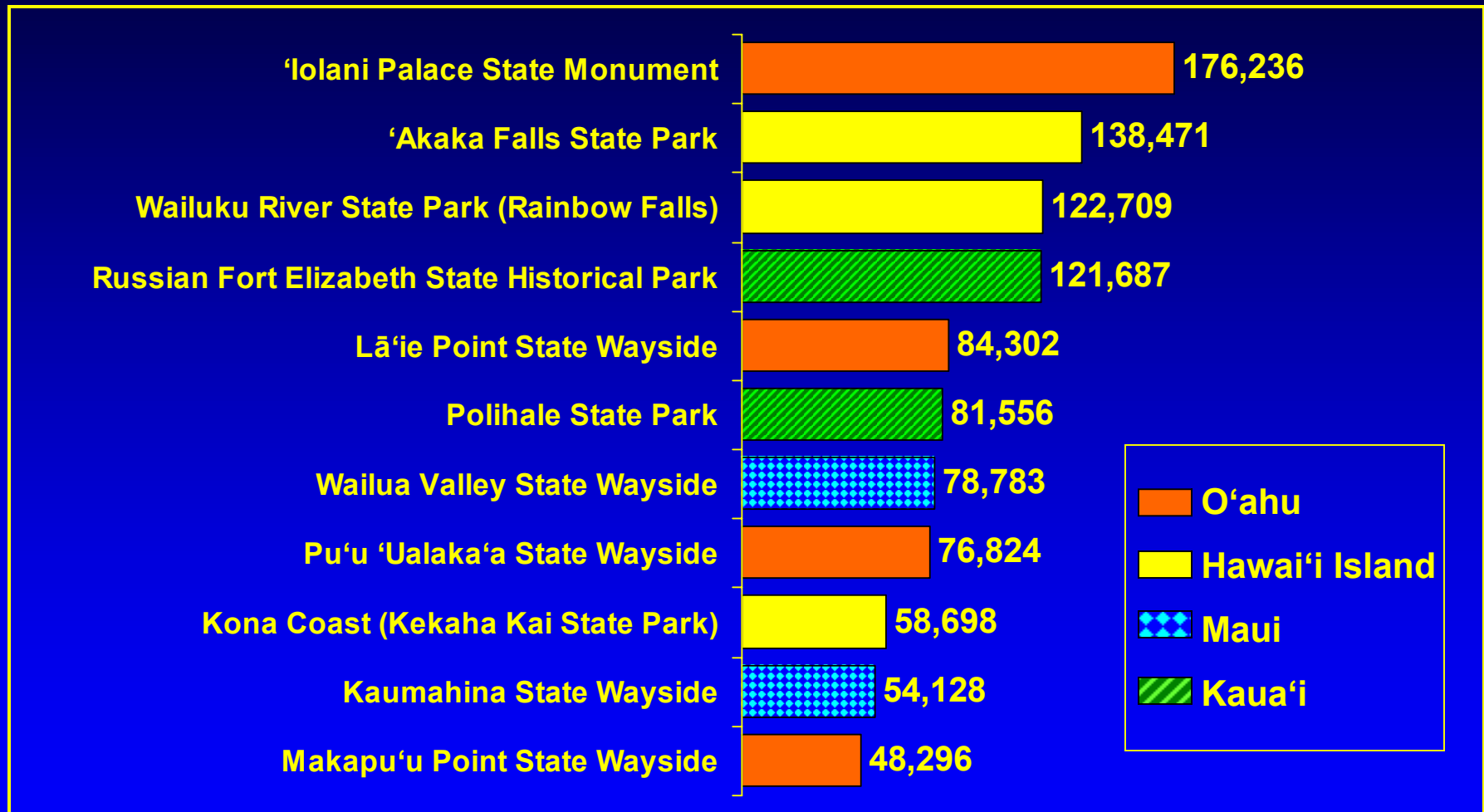
OmniTrak Group Inc.

HAWAII TOURISM AUTHORITY (4023)

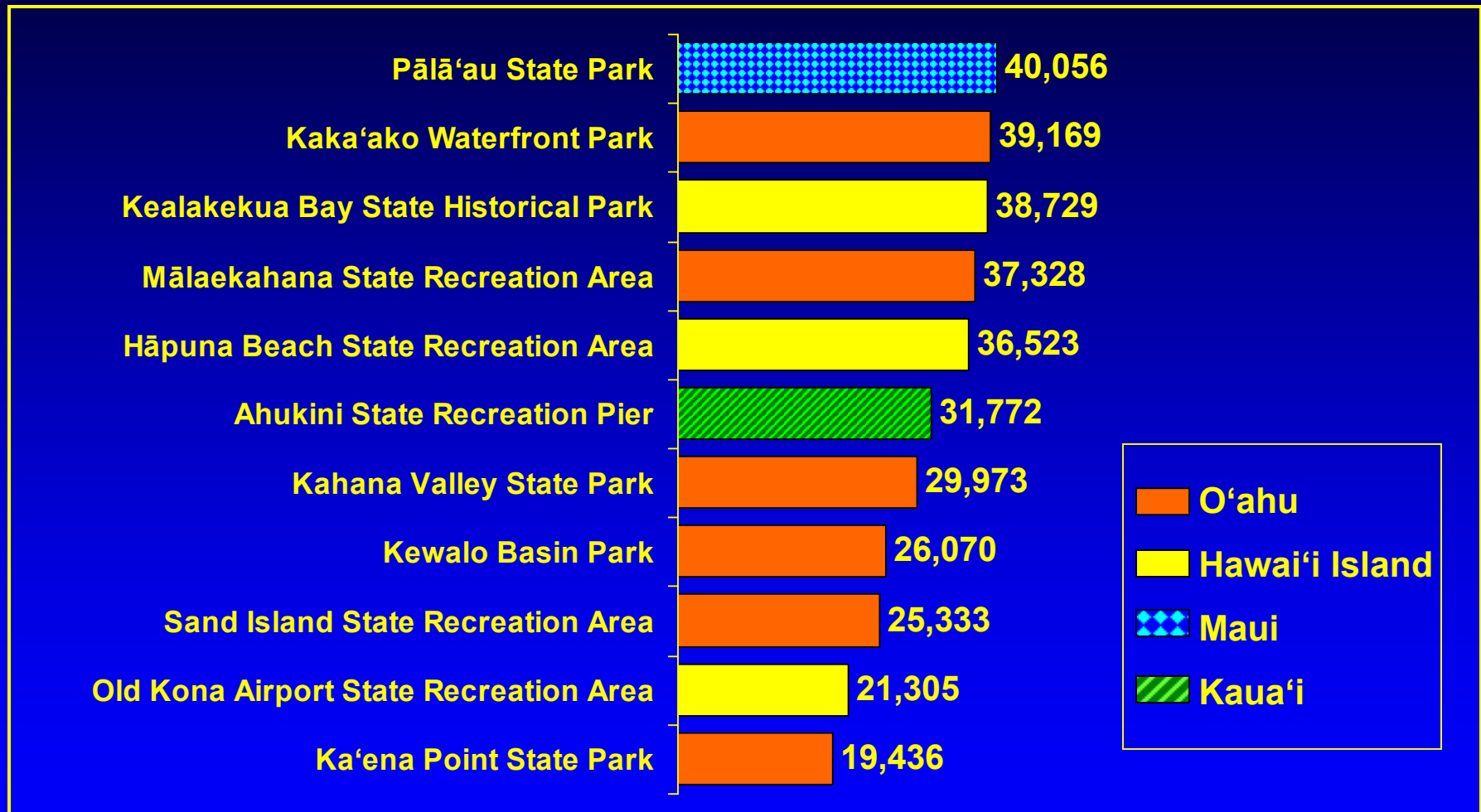
Park Utilization By Out-of-State Visitors (1 of 5)



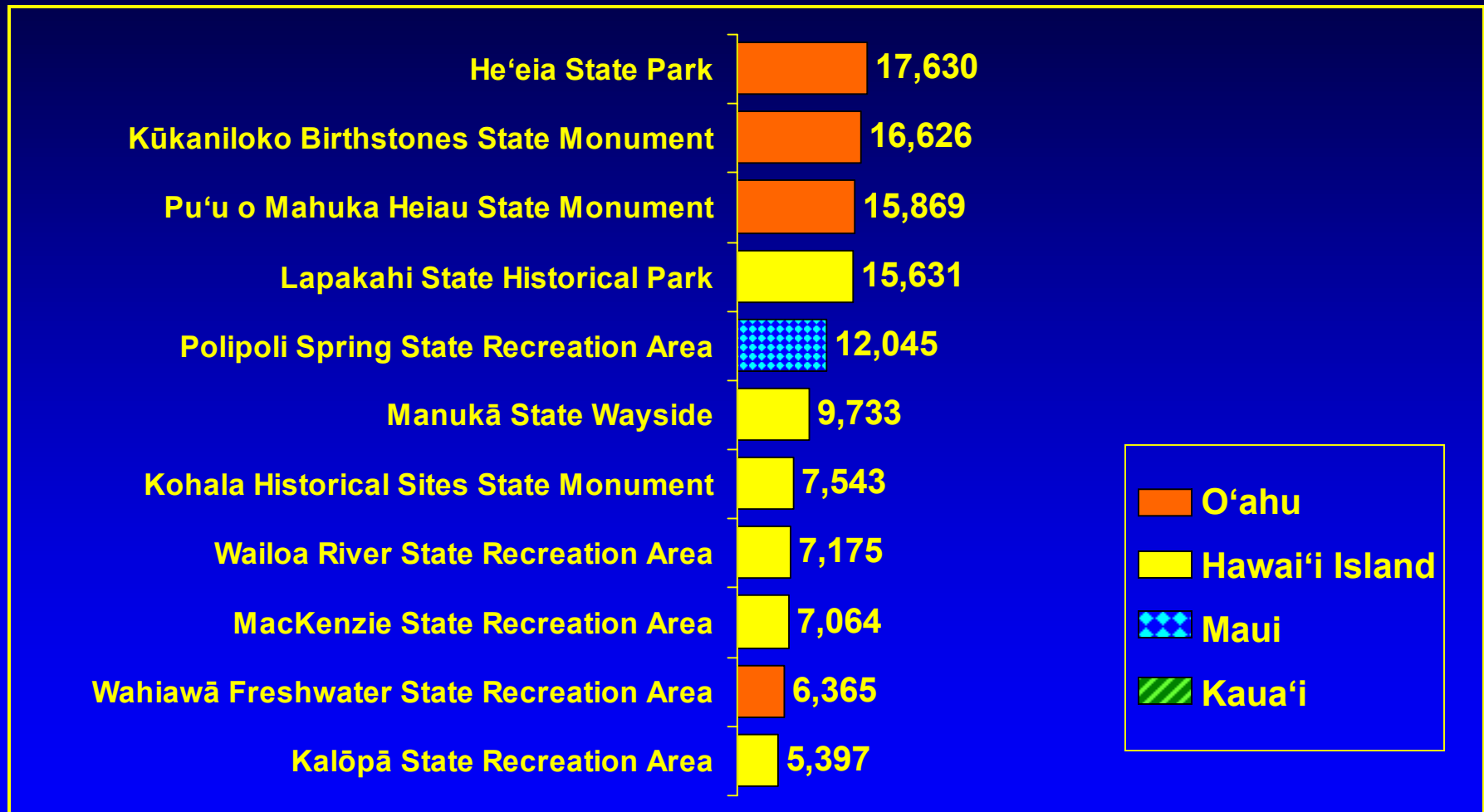
Park Utilization By Out-of-State Visitors (2 of 5)



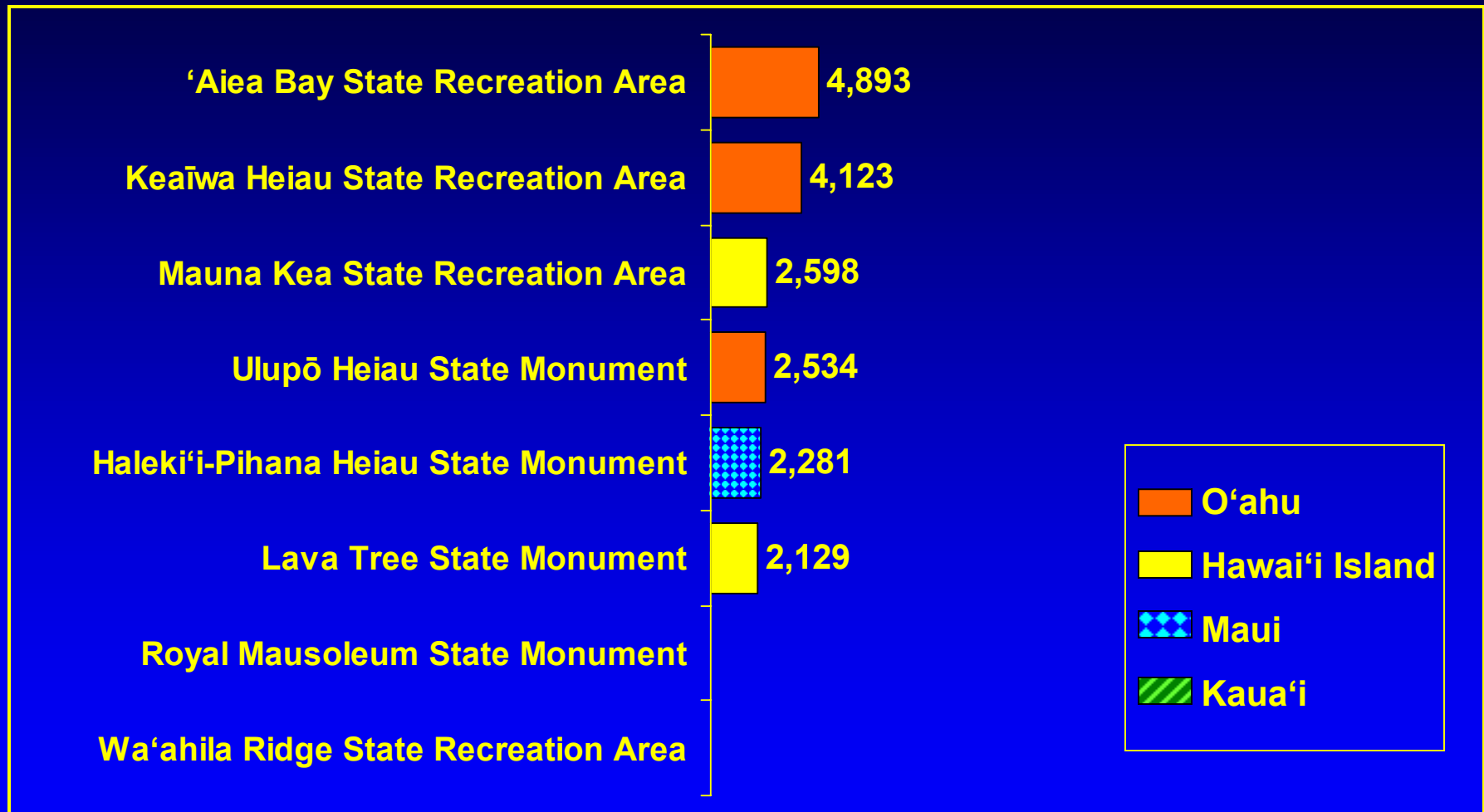
Park Utilization By Out-of-State Visitors (3 of 5)



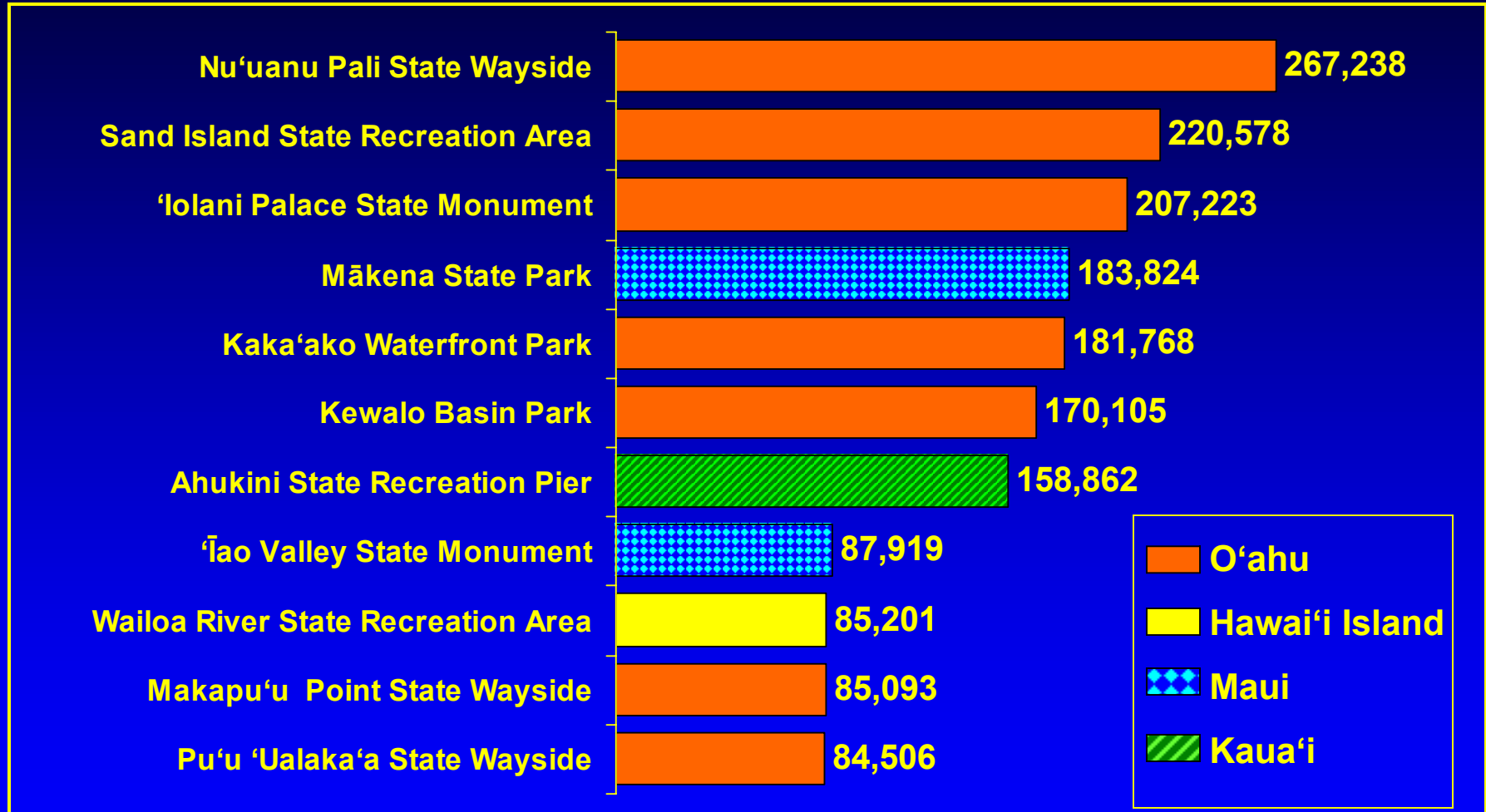
Park Utilization By Out-of-State Visitors (4 of 5)



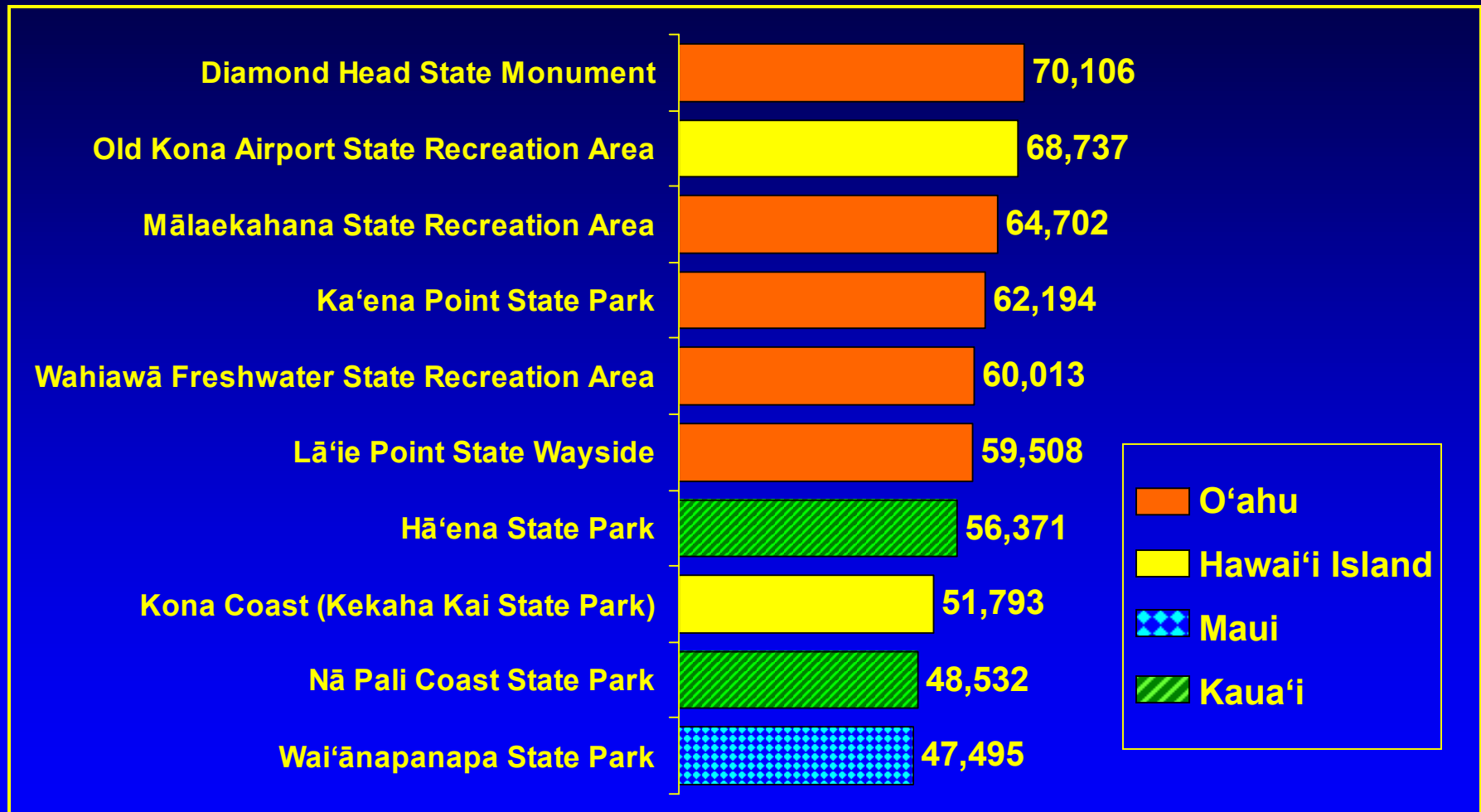
Park Utilization By Out-of-State Visitors (5 of 5)



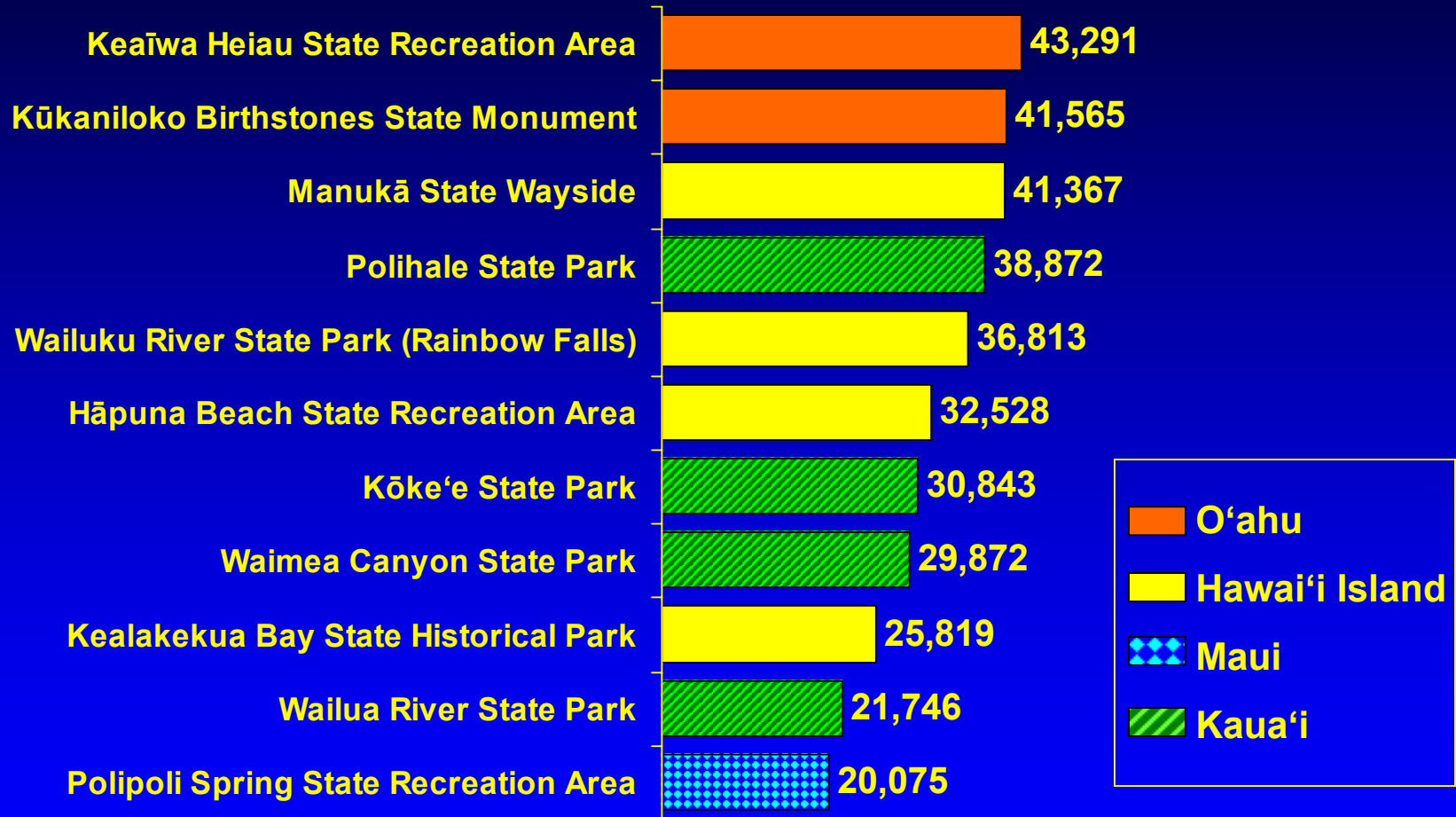
Park Utilization By Residents (1 of 5)



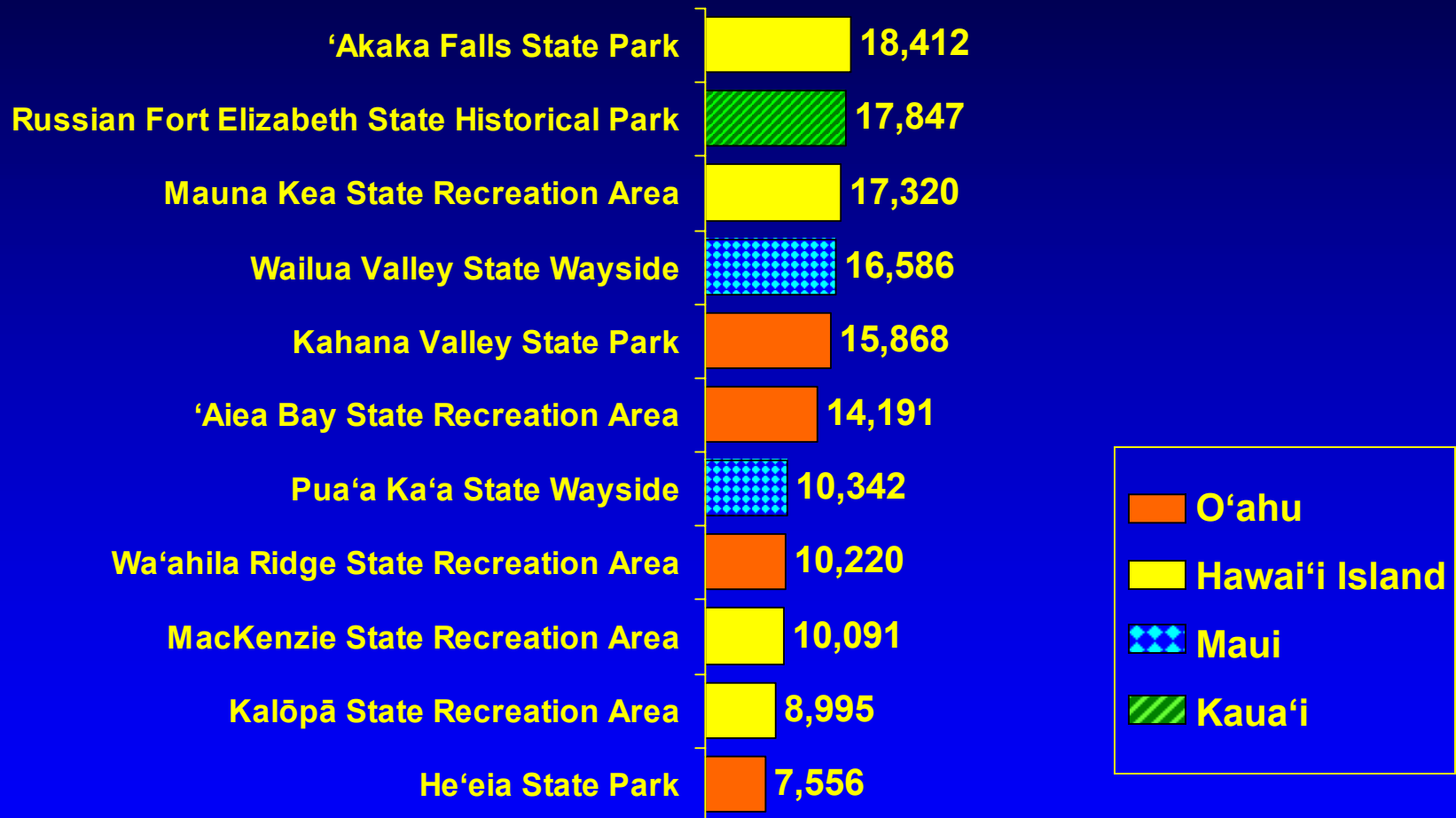
Park Utilization By Residents (2 of 5)



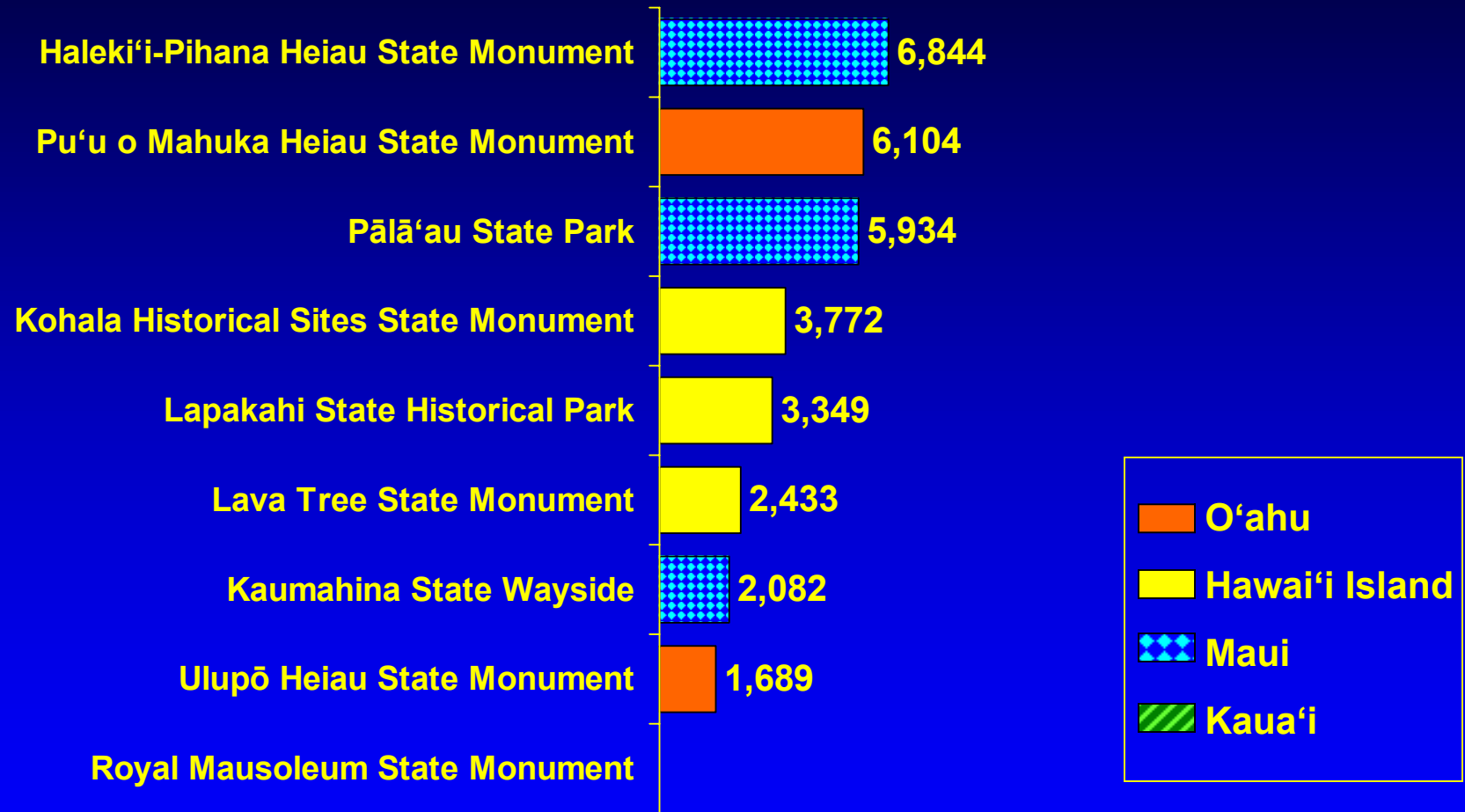
Park Utilization By Residents (3 of 5)



Park Utilization By Residents (4 of 5)



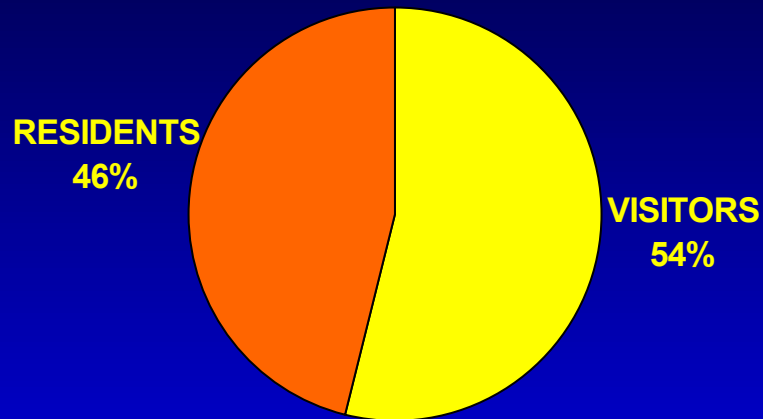
Park Utilization By Residents (5 of 5)



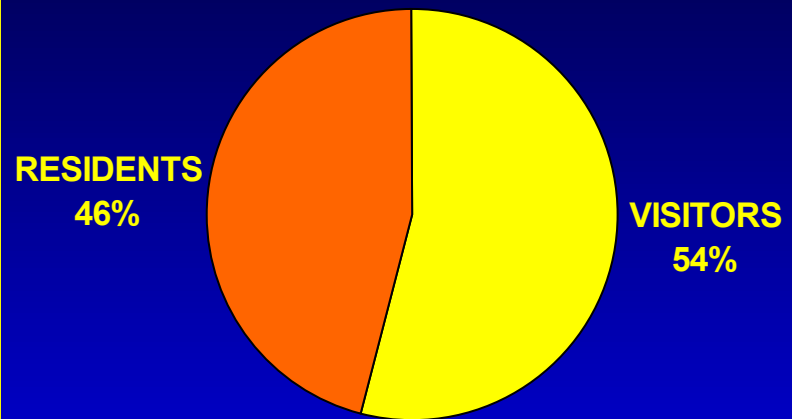
Park User Mix by Island

Out-of-state visitors compose the majority of State Park users on each Island. Almost 9 in 10 park users are out-of-state visitors on Kaua'i, 3 in 4 in Maui County, and just over half on O'ahu and the Hawai'i Island.

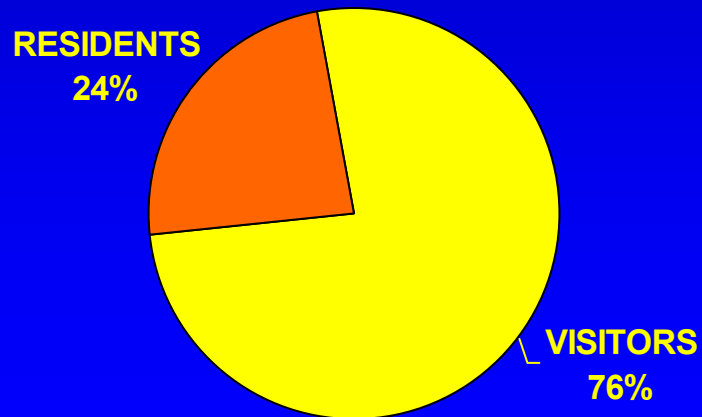
O'AHU



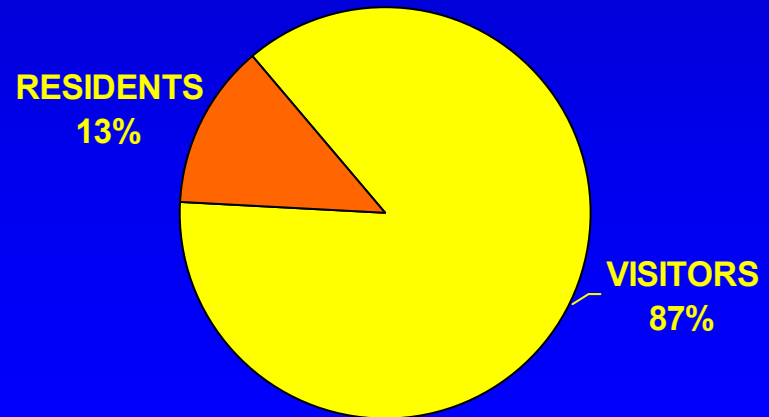
HAWAII ISLAND



MAUI, MOLOKA'I & LANA'I

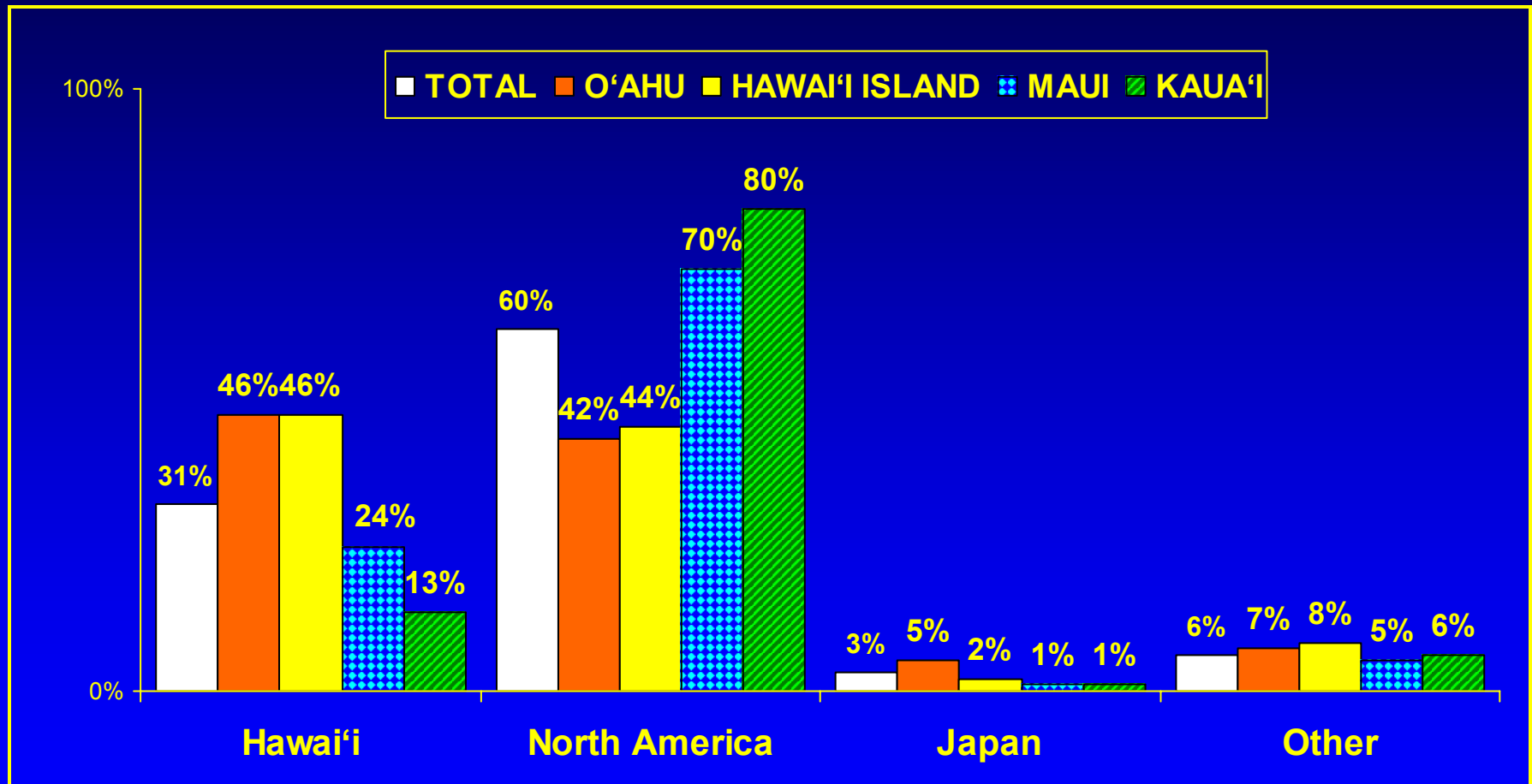


KAUA'I



Visitor By Park

As shown below, North American visitors compose the dominant mix of State Park users on all Islands except O'ahu. O'ahu's user mix is 46% resident, 42% North American, 6% Japanese, and 7% other.



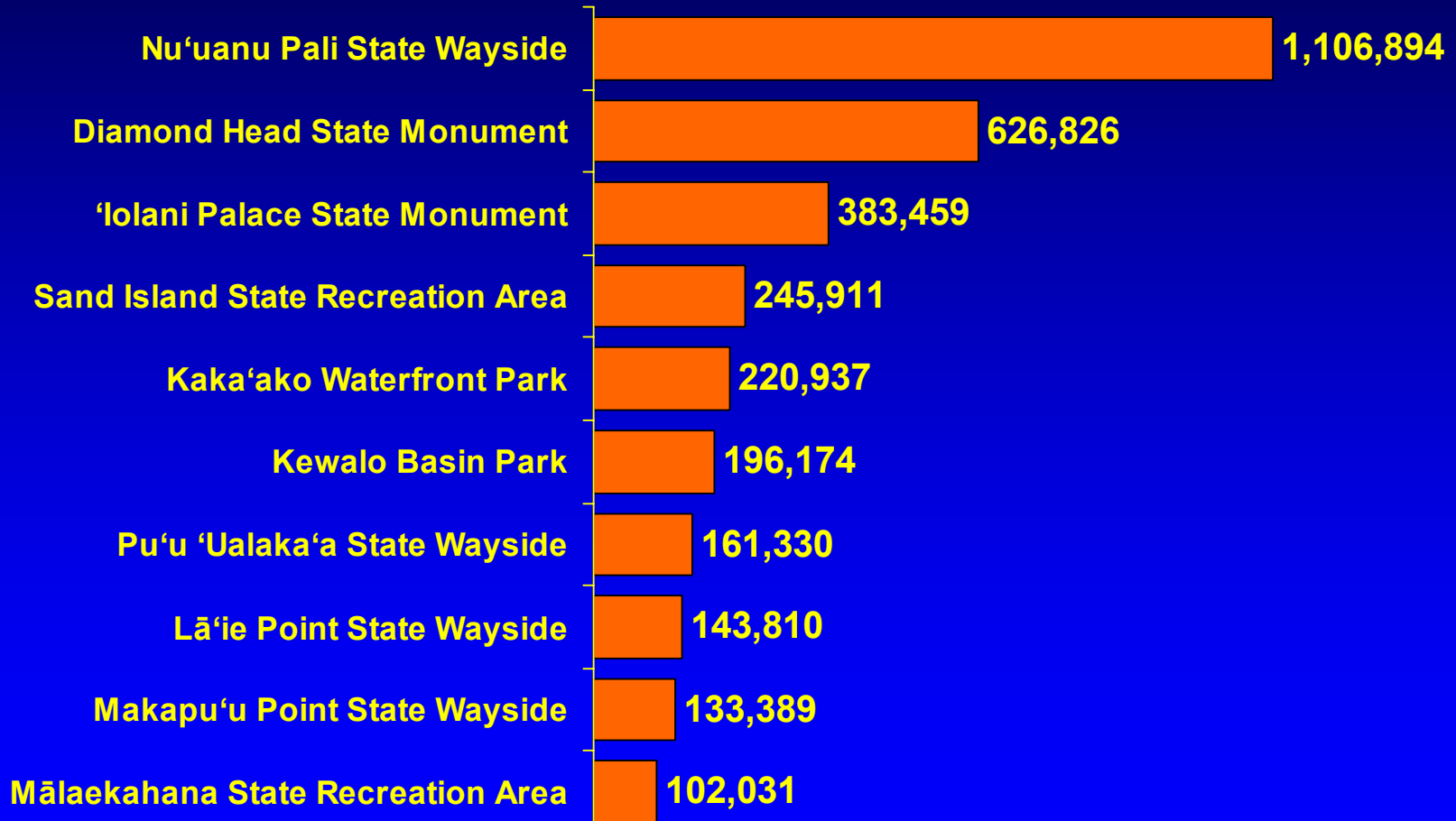
Base: Total (11,658); O'ahu (5,844); Hawaii Island (2,027); Maui (717); Kauai (3,069)

Q1: What is your country of residence?

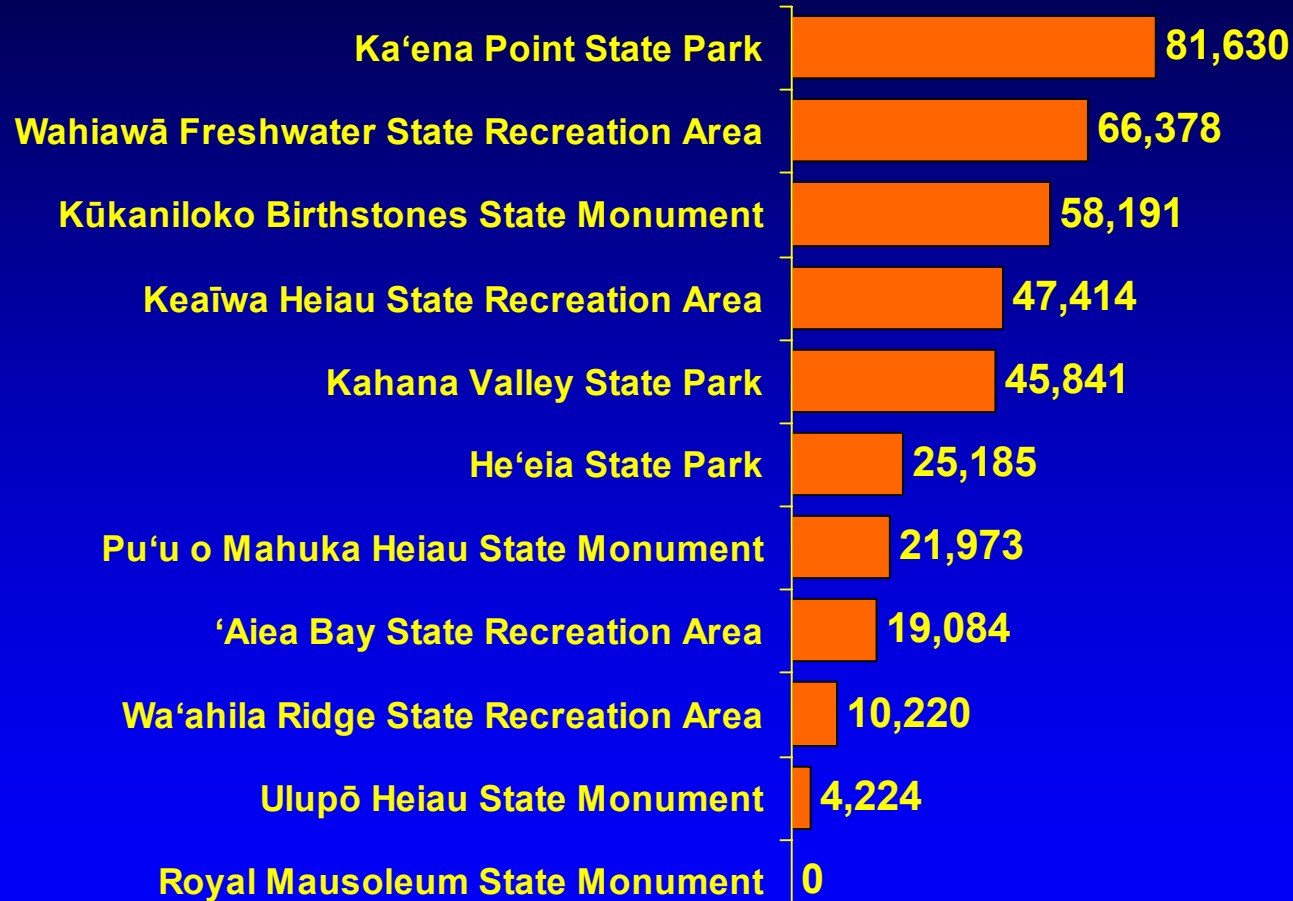


O'ahu Parks Counts (1 of 2)

State Parks on O'ahu with highest utilization have a high mix of out-of-state visitors. The Nu'uuanu Pali State Wayside attracts over a million users. Diamond Head State Monument has about 57% of that usage, with visits decreasing since the inception of fees. 'Iolani Palace State Monument users are approximately half residents and half visitors and include those simply enjoying the Palace grounds.

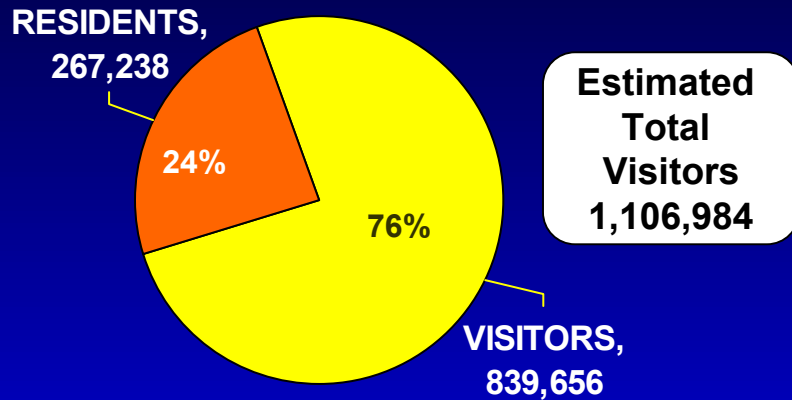


O'ahu Parks Counts (2 of 2)

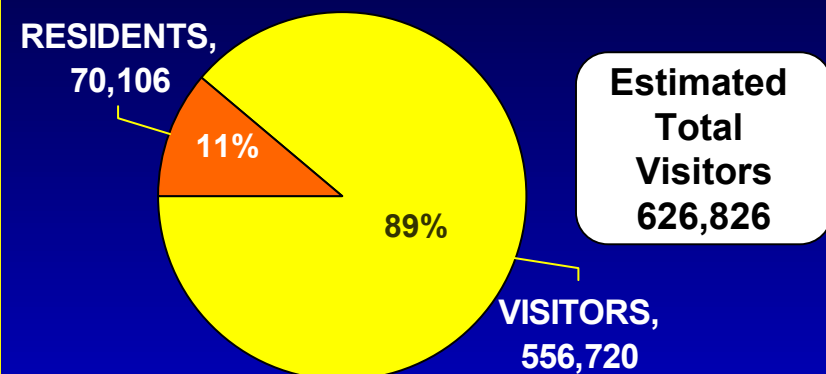


O'ahu Parks With Highest Visitor Volume (Top 4)

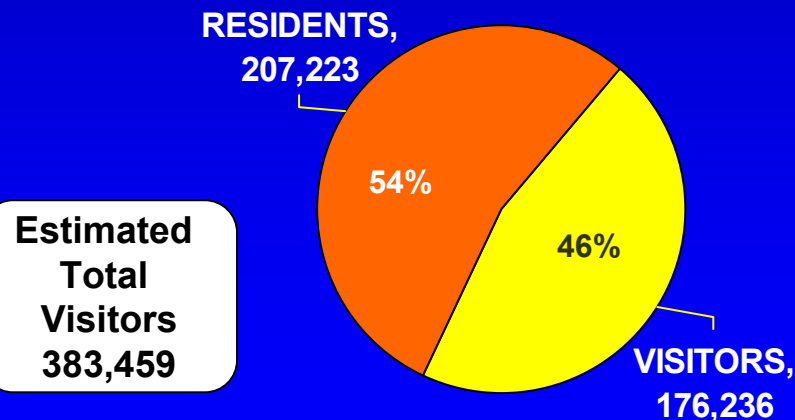
Nu'uanu Pali State Wayside



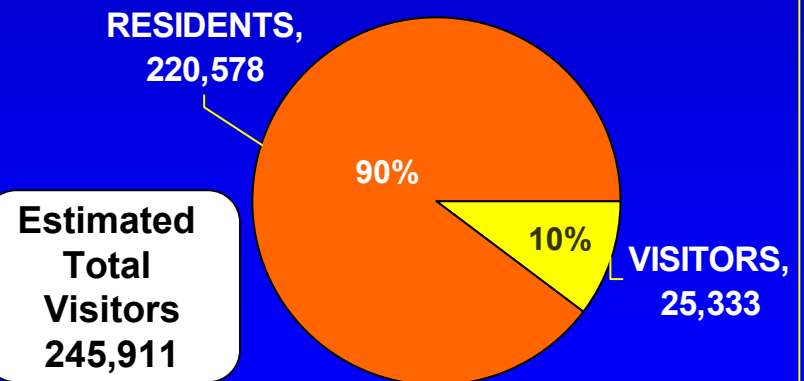
Diamond Head State Monument



'Iolani Palace State Monument

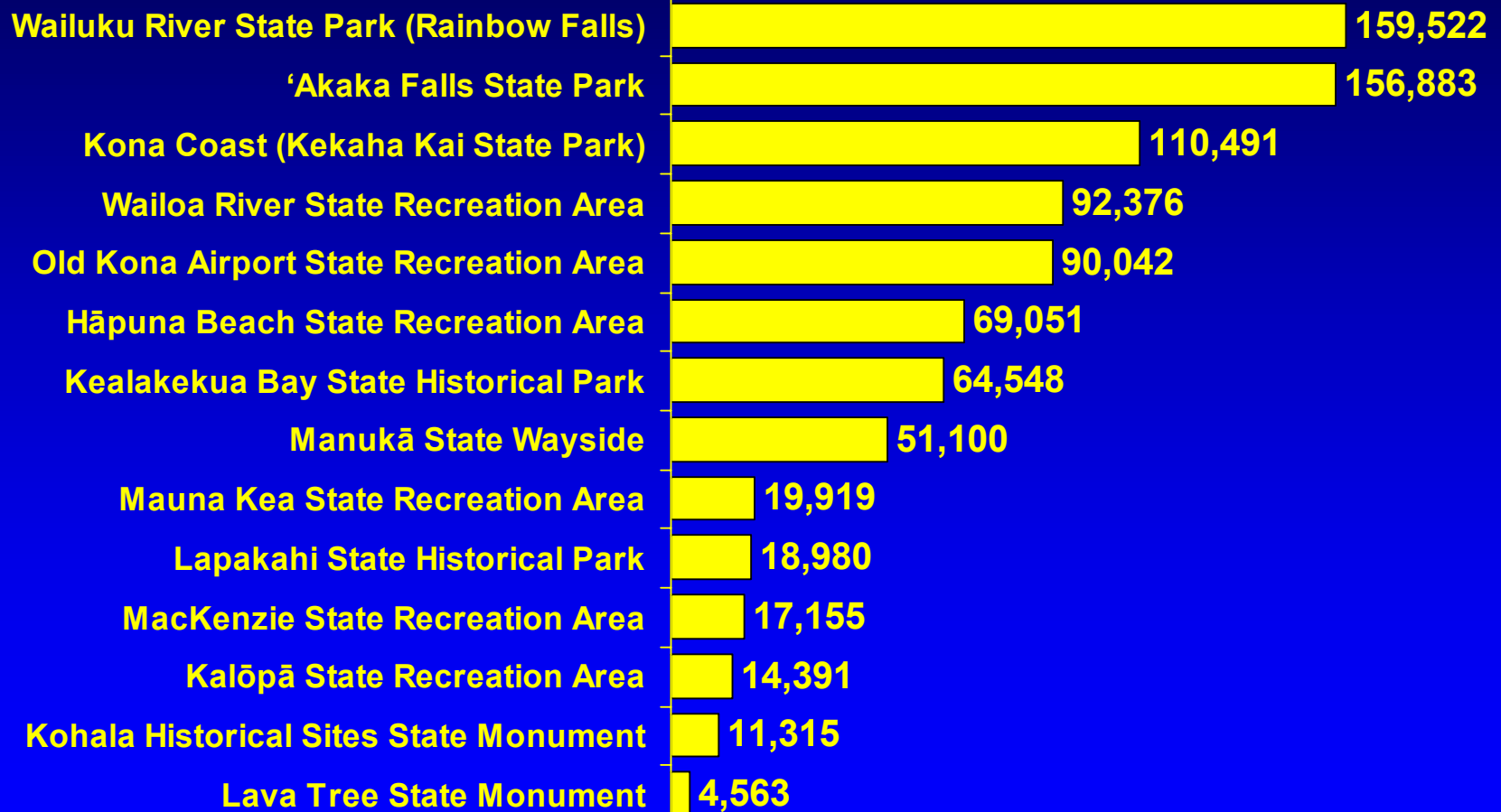


Sand Island State Recreation Area



Hawai'i Island Parks Counts

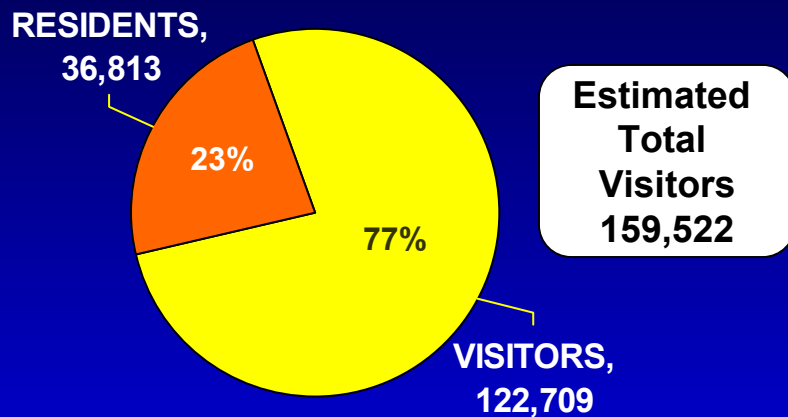
Not surprisingly, Rainbow Falls and 'Akaka Falls State Parks are most heavily utilized on the Hawai'i Island. Both are stops on visitor bus tours of the Island. With a higher mix of resident usage, Kekaha Kai State Park, the Wailoa River State Recreation Area, and the Old Kona Airport State Recreation Area rank 3rd, 4th, and 5th, with each above 90,000 users.



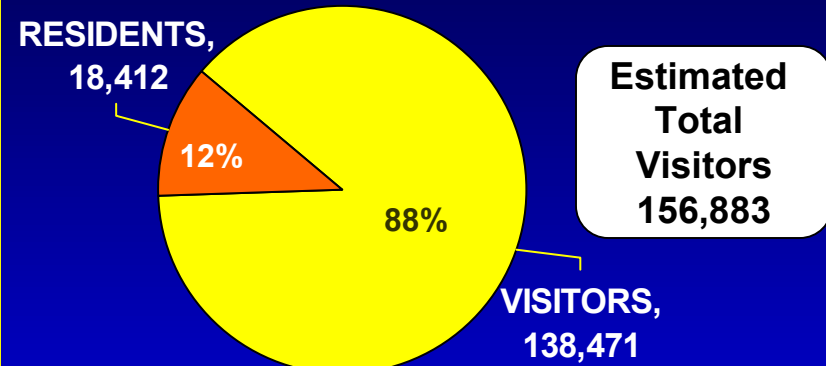
Hawai'i Island Parks With Highest Visitor Volume (Top 4)

The most popular Hawai'i Island State Parks have mixed utilization. While Kekaha Kai and Wailoa River parks have a large mix of residents, Rainbow and 'Akaka Falls are dominantly visitor destinations.

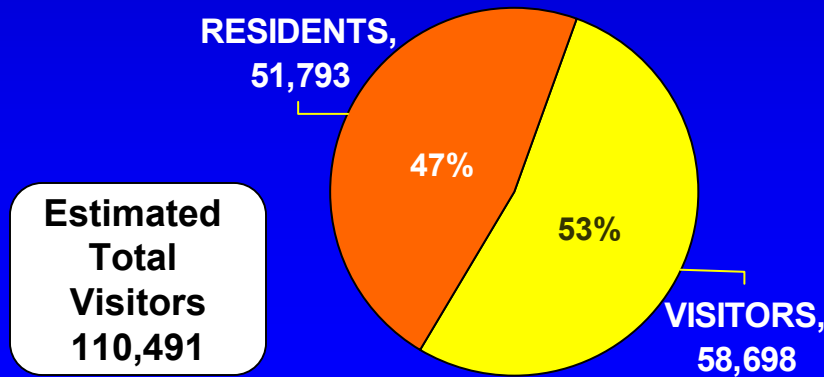
Wailuku River/ Rainbow Falls



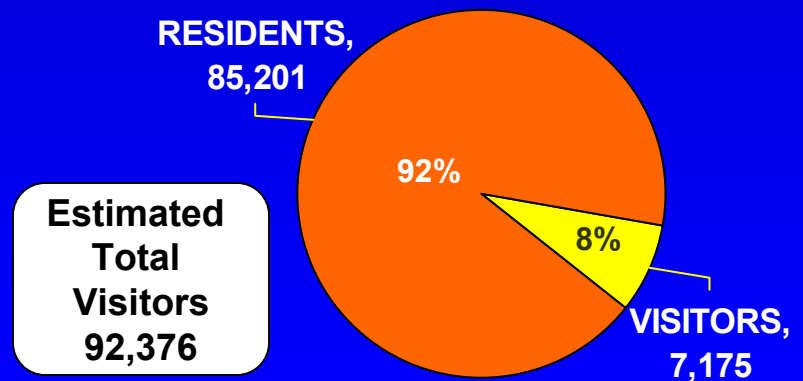
'Akaka Falls State Park



Kona Coast (Kekaha Kai State Park)

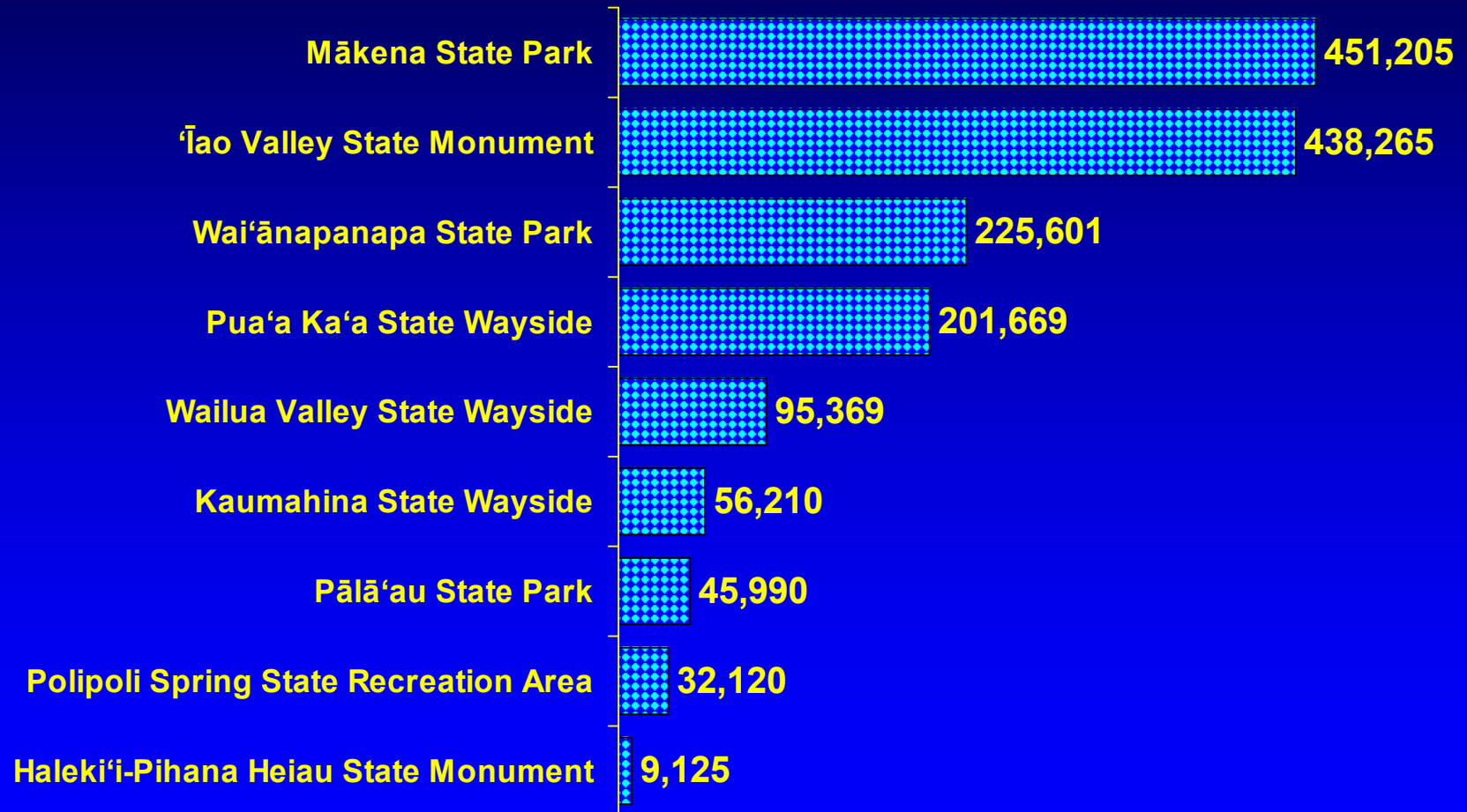


Wailoa River State Recreation Area



Maui Parks Counts

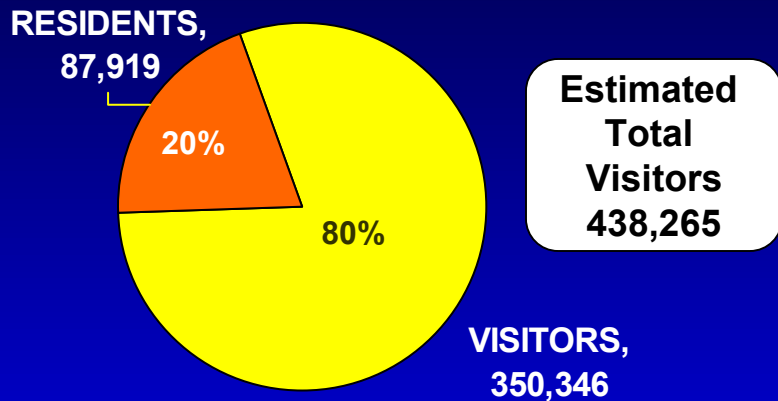
On Maui, the parks with counts of more than 200,000 are all used mostly by out-of-state visitors. The West Maui Ocean Park at Mākena State Park is most popular with usage of more than 450,000. The 'Īao Valley State Monument, a regular tour bus stop, ranks second. Two parks in Hana each have utilization of more than 200,000.



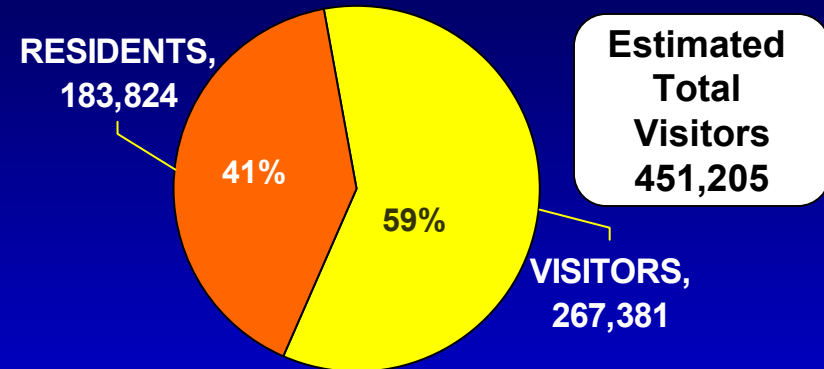
Maui Parks With Highest Visitor Volume (Top 4)

The four most popular Maui parks all have a majority of users from out-of-state.

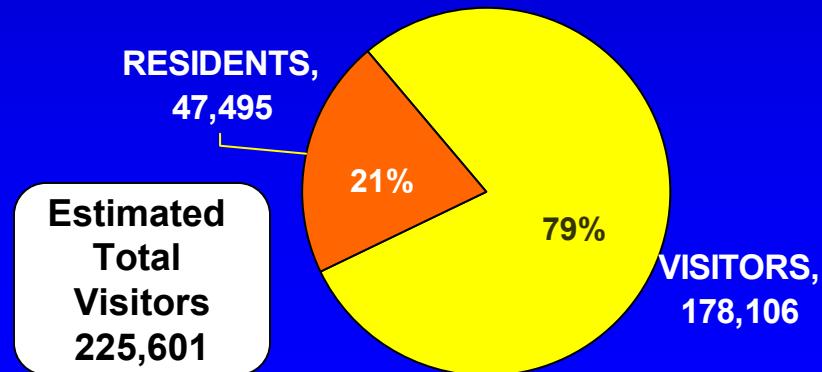
Īao Valley State Monument



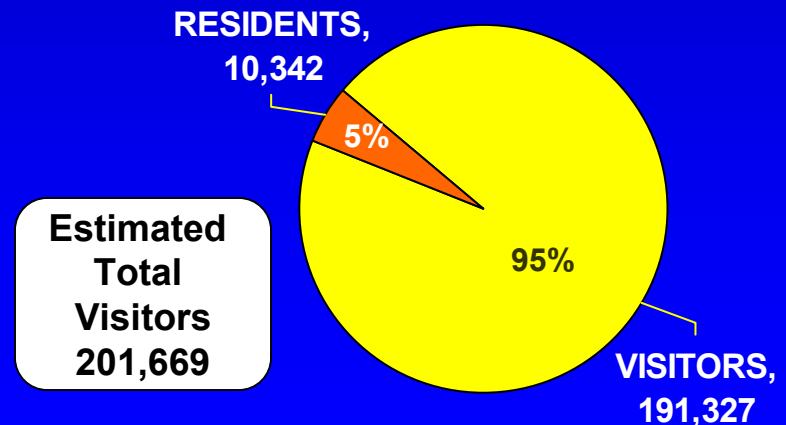
Mākena State Park



Waiʻānapanapa State Park

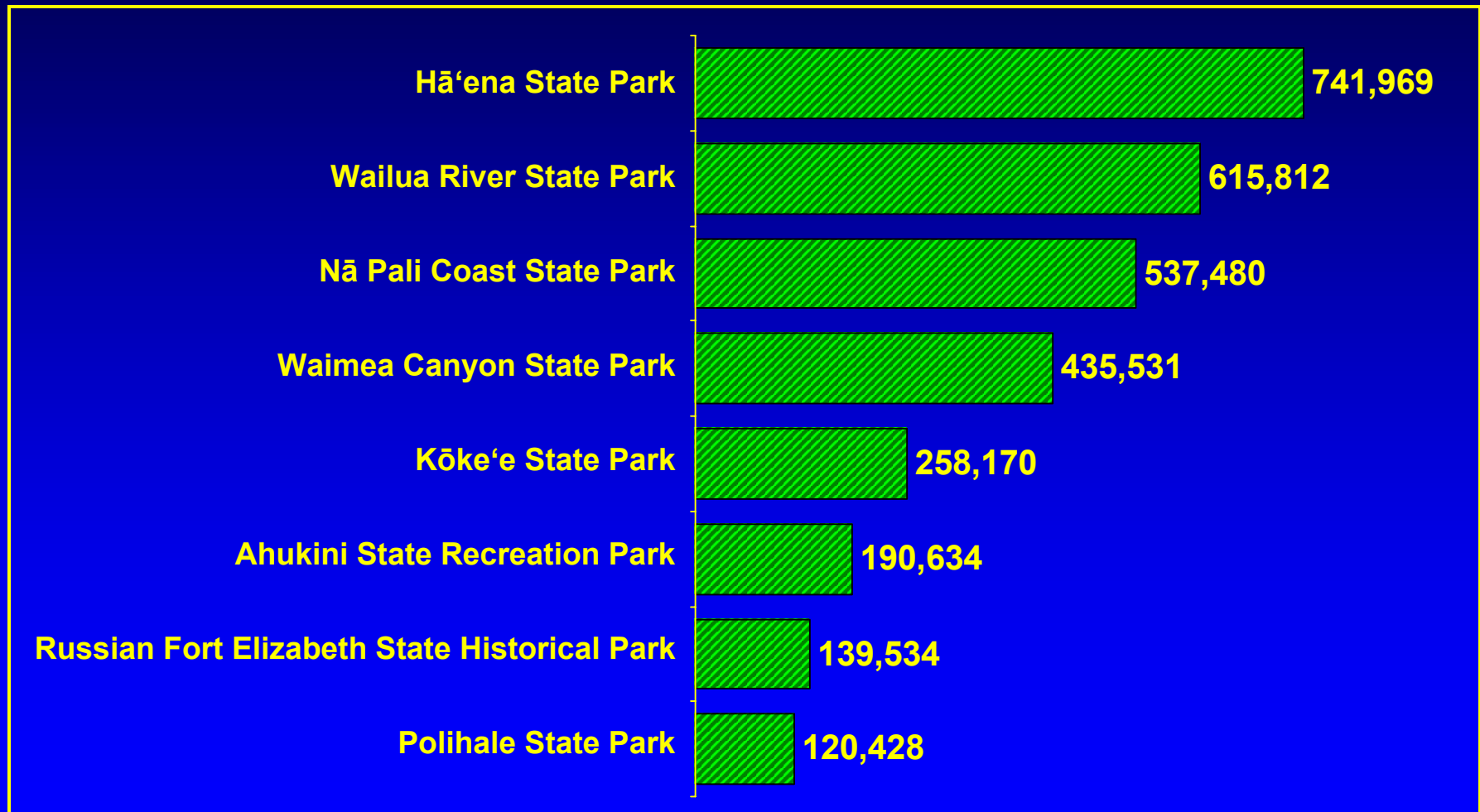


Puaʻa Kaʻa State Wayside



Kaua'i Parks Counts

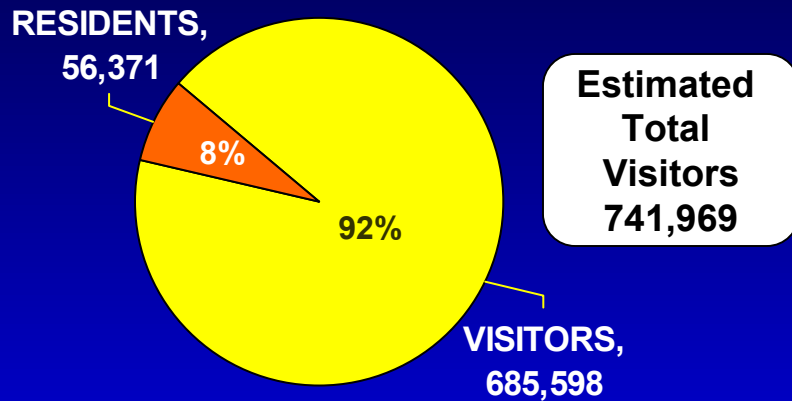
Parks on Kaua'i's North Shore and the Wailua River are the most popular, with each hosting more than an estimated 500,000 users. User counts at Waimea Canyon are about 400,000.



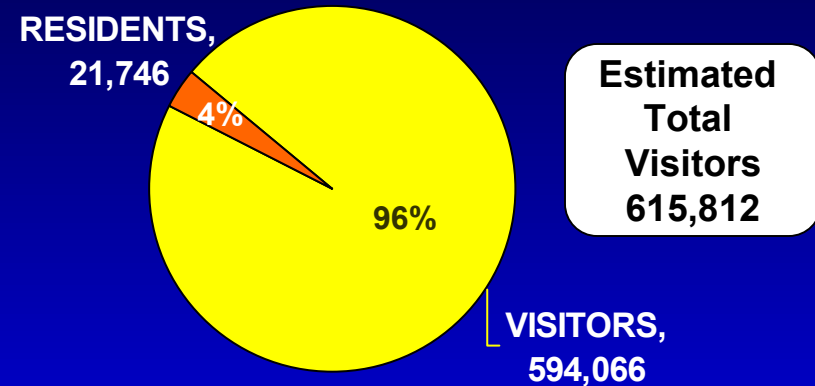
Kaua'i Parks With Highest Visitor Volume (Top 4)

The user mix at Kaua'i's four most popular parks are dominantly out-of-state visitors.

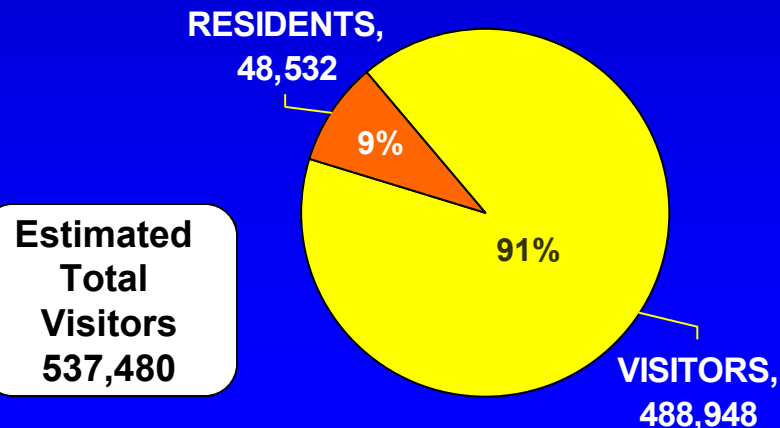
Hā'ena State Park



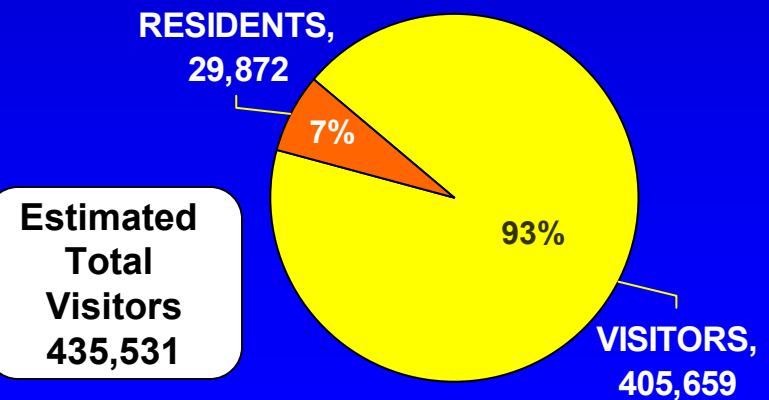
Wailua River State Park



Nā Pali Coast State Park



Waimea Canyon State Park

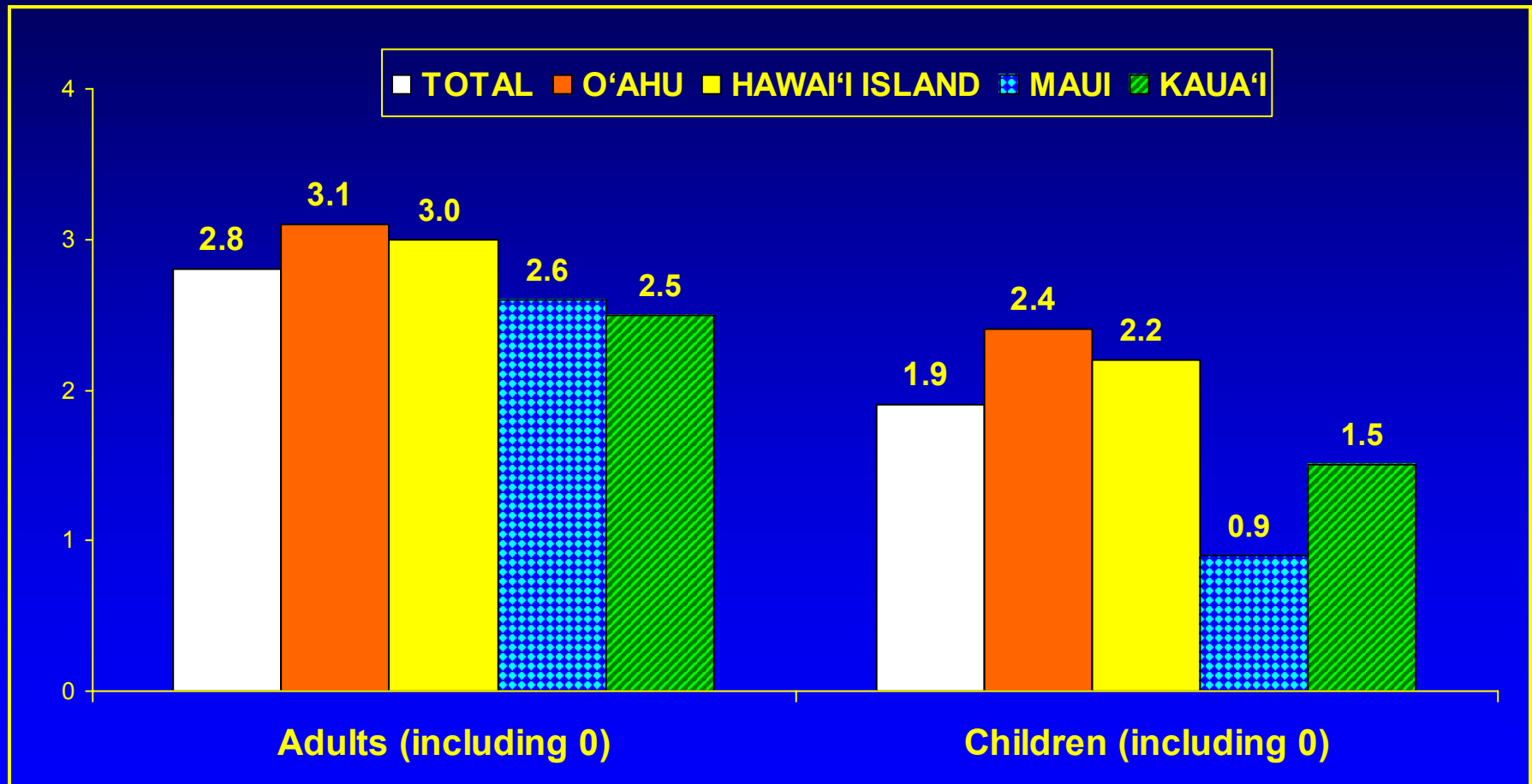


PROFILE OF PARK USERS



Party Size

Hawai'i's State Parks attract families. The average estimated party size is 2.8 adults and 1.9 children.



Base: Total (11,658); O'ahu (5,844); Hawai'i Island (2,027); Maui (717); Kaua'i (3,069)

Q2: How many persons including yourself, are in your party visiting this park today?



Party Size by Segment and Island

User party sizes differ both by island and by place of residency. On O‘ahu and the Hawai‘i Island, resident party sizes are larger than out-of-state visitors. That is reversed on Maui and Kaua‘i.

	O‘AHU		HAWAI‘I ISLAND		MAUI		KAUA‘I	
	Resi-dents	Visi-tors	Resi-dents	Visi-tors	Resi-dents	Visi-tors	Resi-dents	Visi-tors
Adults (including 0)	3.3	3.1	3.2	2.8	2.9	2.4	2.9	2.5
Children (including 0)	3.0	1.7	2.4	1.6	1.3	1.0	2.0	1.4

Q2: How many persons including yourself, are in your party visiting this park today?

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.



Demographics for All Park Users

- Generally, there are more park users who are male than female, except for the out-of-state visitors on the Hawai'i Island.
- O'ahu park users are generally younger than those who visit the rest of the islands, with an average age of 40.9 for all park users, 38.7 for residents, and 42.9 for out-of-state visitors. There are more older residents visiting parks on Kaua'i (average 44 years old), and more older out-of-state visitors visiting parks on Maui (average 47.2 years old).
- The majority of park users are higher educated, with college-some/graduate/post education level.
- Out-of-state visitors on Maui and Kaua'i tend to have higher incomes. Resident park users have generally lower income than out-of-state visitors for all the islands.



Demographics for All Park Users

	TOTAL	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
GENDER					
Male	56%	58%	50%	58%	53%
Female	44%	42%	50%	42%	47%
AGE					
16-24	8%	13%	8%	5%	4%
25-34	22%	25%	17%	20%	23%
35-44	21%	21%	20%	17%	23%
45-54	21%	18%	22%	26%	22%
55-64	14%	11%	16%	18%	16%
65+	8%	7%	9%	9%	8%
Average	43.3	40.9	45	45.8	44.4
EDUCATION					
Some high school	3%	4%	4%	1%	2%
High school/Vocational graduate	17%	21%	25%	15%	11%
College-some/Graduate/Post	77%	71%	66%	83%	84%
INCOME					
Under \$45,000	16%	24%	23%	13%	8%
\$45,000 to \$49,999	18%	24%	19%	12%	43%
\$50,000 to \$99,999	38%	34%	37%	40%	41%
\$100,000 or more	29%	19%	22%	35%	38%

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.



Demographics for Residents

	TOTAL	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
GENDER					
Male	61%	63%	55%	62%	56%
Female	39%	37%	45%	38%	44%
AGE					
16-24	14%	17%	12%	13%	6%
25-34	23%	24%	17%	20%	27%
35-44	22%	23%	20%	21%	18%
45-54	19%	17%	23%	21%	19%
55-64	10%	8%	11%	14%	15%
65+	6%	6%	8%	2%	9%
Average	40.3	38.7	42.8	41.1	44.0
EDUCATION					
Some high school	5%	5%	5%	4%	7%
High school/Vocational graduate	27%	28%	35%	24%	22%
College-some/Graduate/Post	64%	65%	55%	68%	65%
INCOME					
Under \$45,000	34%	35%	35%	36%	28%
\$45,000 to \$49,999	28%	29%	23%	19%	34%
\$50,000 to \$99,999	28%	27%	32%	28%	30%
\$100,000 or more	10%	9%	10%	17%	10%



Demographics for Out-of-State Visitors

	TOTAL	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
GENDER					
Male	54%	55%	46%	57%	53%
Female	47%	46%	54%	43%	47%
AGE					
16-24	5%	10%	3%	3%	4%
25-34	22%	23%	18%	20%	23%
35-44	21%	20%	20%	16%	23%
45-54	23%	19%	22%	27%	23%
55-64	16%	13%	20%	19%	16%
65+	9%	8%	10%	12%	8%
Average	44.6	42.9	46.9	47.2	44.4
EDUCATION					
Some high school	2%	2%	3%	1%	1%
High school/Vocational graduate	13%	16%	16%	12%	10%
College-some/Graduate/Post	83%	76%	76%	87%	87%
INCOME					
Under \$45,000	8%	13%	12%	6%	5%
\$45,000 to \$49,999	13%	20%	15%	10%	10%
\$50,000 to \$99,999	42%	41%	41%	44%	43%
\$100,000 or more	37%	27%	33%	40%	43%



Number of Visits

About half of park users are first time users of the park they are visiting. More than 70% of Kaua'i park users are first time users. Hawai'i Island park users tend to be repeat users.

	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
1	49%	41%	57%	73%
2 to 5	20%	14%	15%	11%
6 to 9	6%	9%	6%	2%
10 to 49	12%	14%	9%	4%
50 to 99	4%	6%	3%	2%
100+	6%	8%	6%	2%
Mean	18.7	28.3	16.0	9.3

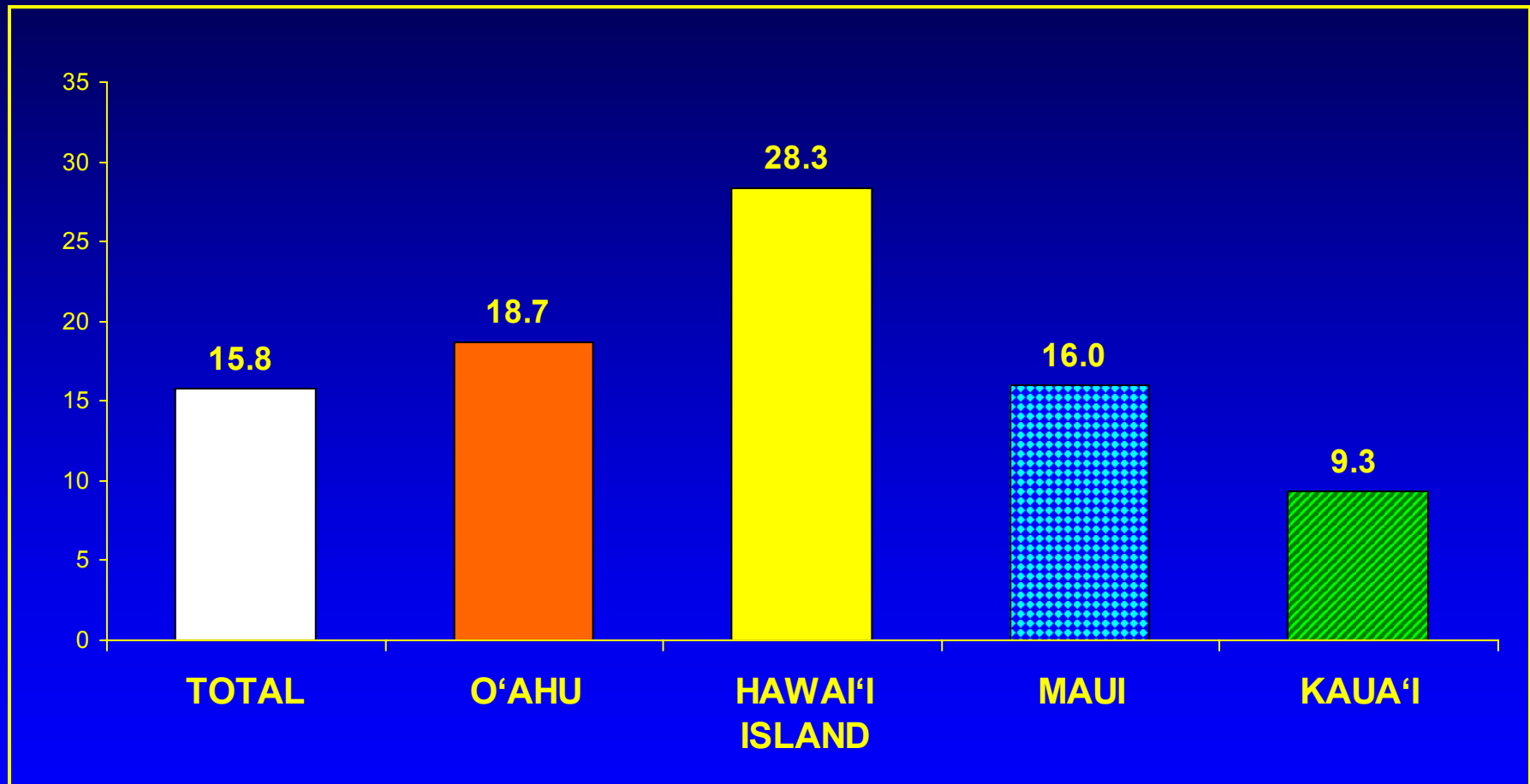
Q3: In the last year, how many visits did you make to this park including this one?

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.



Frequency of Visits

Hawai'i Island park users tend to be repeated users with an average of 28 visits a year. Kaua'i park users are less likely to be repeated users with an average of 9.3 visits a year.



Base: Total (11,658); O'ahu (5,844); Hawai'i Island (2,027), Maui (717); Kaua'i (3,069)

Q3: In the last year, how many visits did you make to this park including this one?



Travelgraphics (Out-of-State Visitors Only)

- More out-of-state visitors are repeat visitors to the Hawai'i Island and Maui with an average of approximately 5 visits. There are more first time visitors who are park users on O'ahu than the rest of the islands.
- More than half of the visitors describe themselves as oriented toward nature/scenery or relaxation; the remaining are oriented toward activities, sand/surf, or family.



Travelgraphics (Out-of-State Visitors Only)

	TOTAL	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
NUMBER OF TRIPS TO HAWAI'I					
1	37%	41%	32%	38%	35%
2	17%	17%	17%	13%	20%
3	11%	9%	10%	10%	12%
4	6%	6%	4%	6%	7%
5+	21%	15%	24%	26%	23%
No answer	8%	11%	14%	9%	4%
Average	4.0	3.3	4.9	4.9	3.9
VISITOR TYPE					
Nature/Scenery	35%	28%	40%	36%	38%
Relaxation	21%	24%	18%	23%	19%
Activities	16%	16%	15%	11%	17%
Sand/Surf	15%	13%	16%	16%	18%
Family	7%	11%	7%	8%	4%
Culture	3%	4%	4%	3%	2%
Socializing	2%	3%	1%	3%	1%

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.

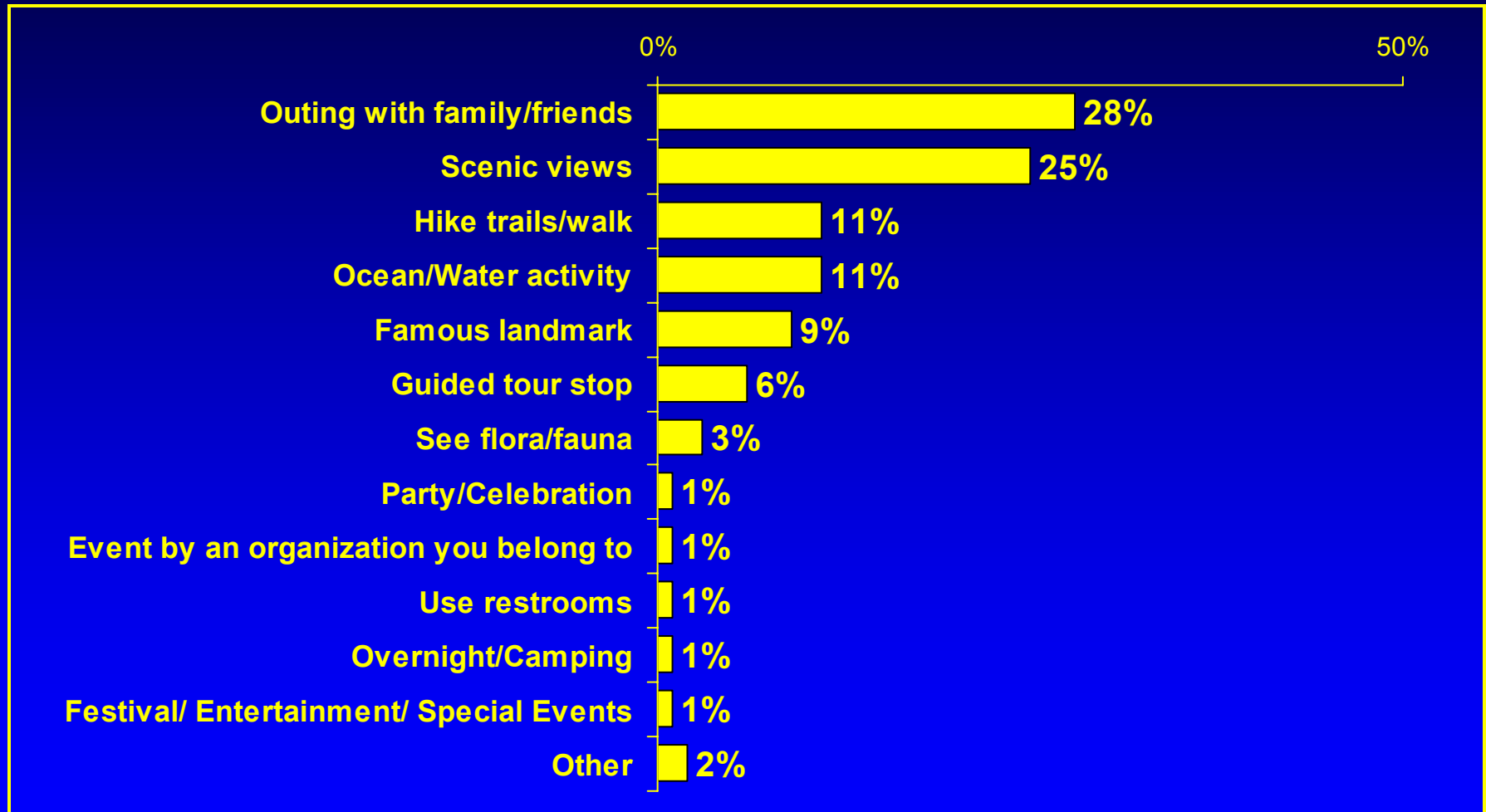


MOTIVATIONAL ANALYSIS



Main Reason for Park Visit (Statewide)

Residents are motivated to visit a state park for a family outing, scenery or specific outdoor attractions such as hiking or ocean activities. Other reasons are mentioned by fewer than 1 in 10 users.



Base: 11658

Q4: What is the main reason for visiting this park?

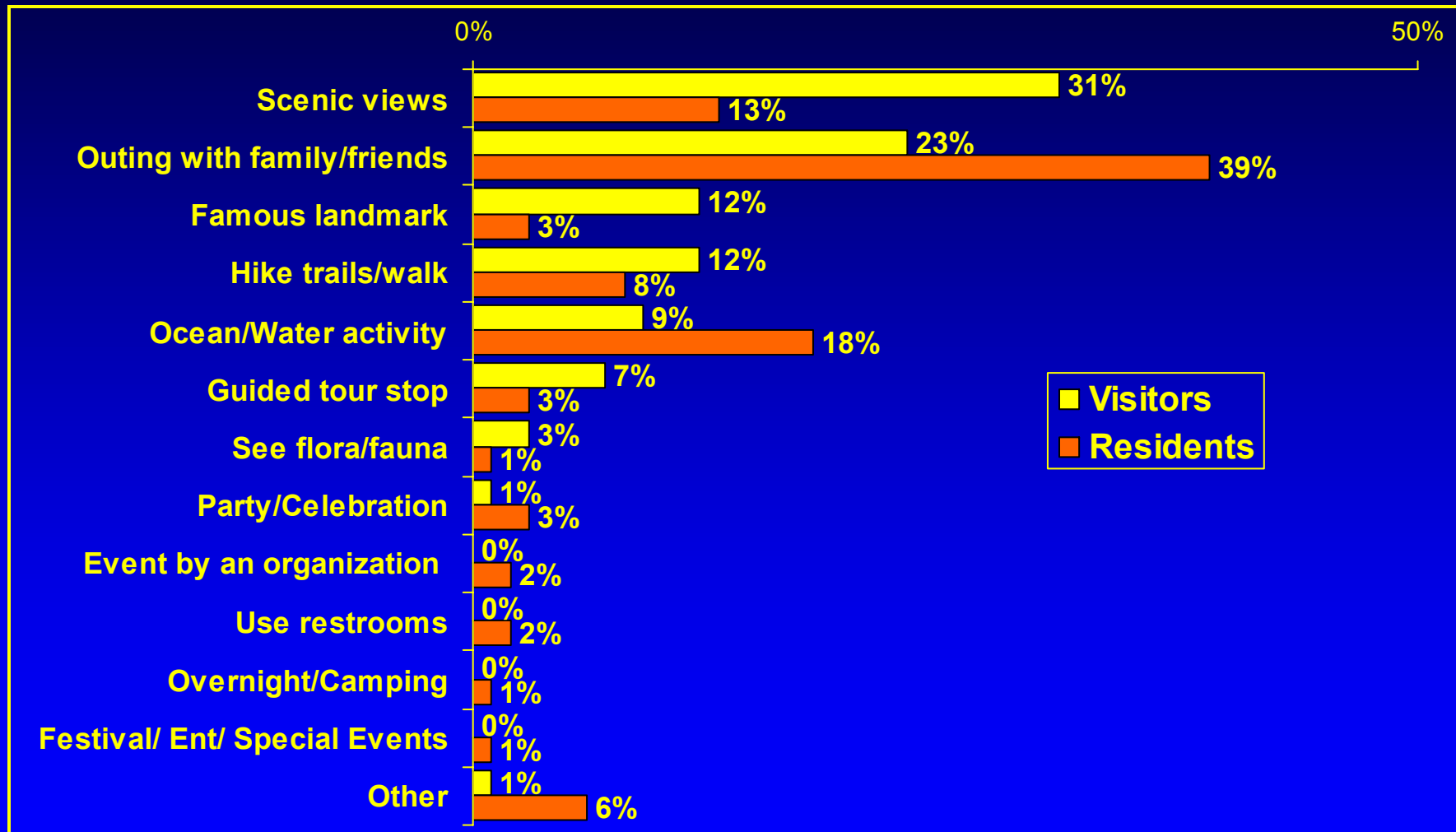


OmniTrak Group Inc.

HAWAII TOURISM AUTHORITY (4023)

Main Reason for Park Visits by Segment

Different segments of park users are motivated for different reasons. While out-of-state visitors go for the scenic views or outing, the latter is the main motivation for residents.



Base: Residents (3,447); Visitors (8,211)

Q4: What is the main reason for visiting this park?

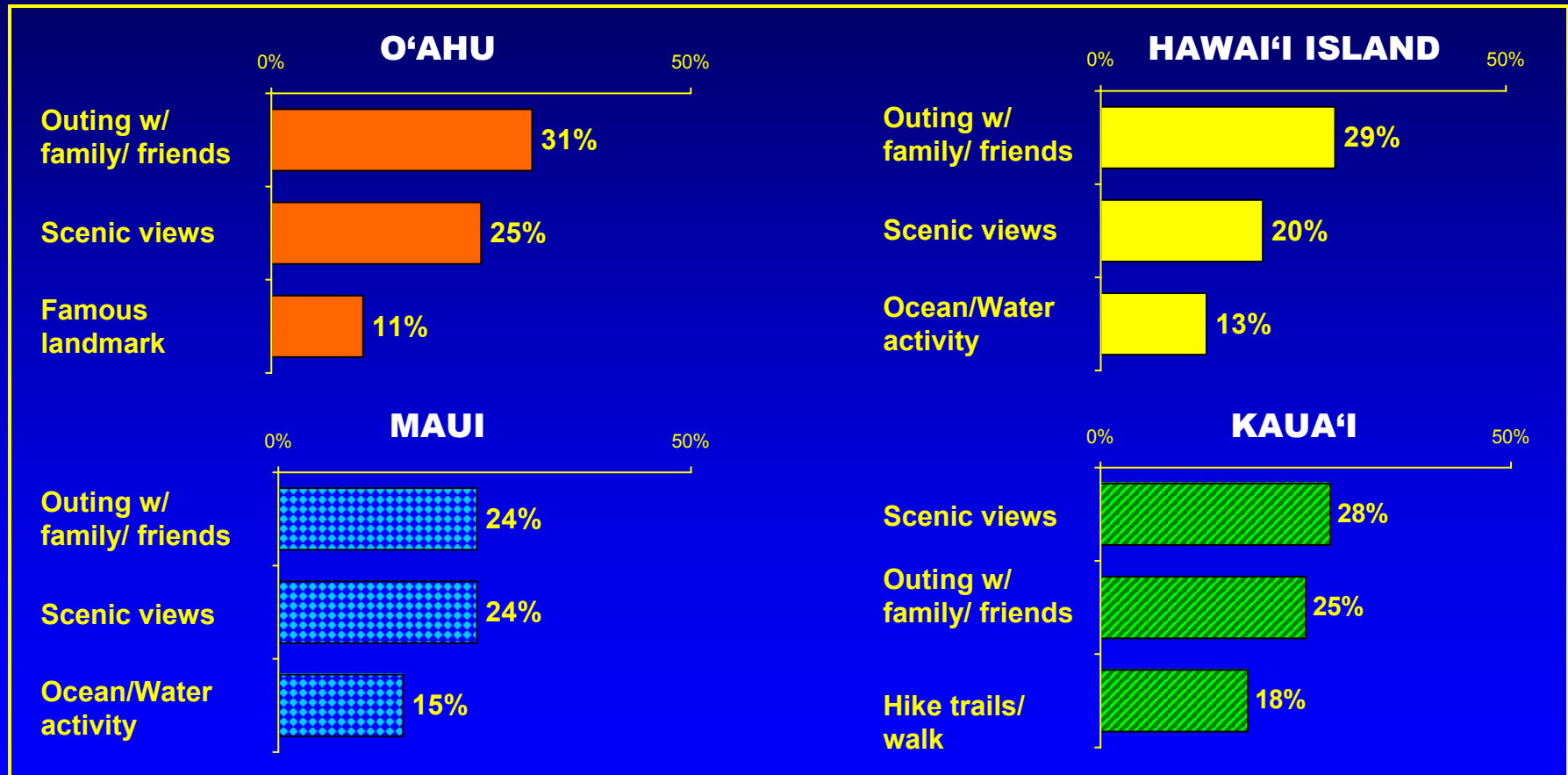


OmniTrak Group Inc.

HAWAII TOURISM AUTHORITY (4023)

Park User Motivations By Island

While State Park users across the Islands share similar interests in outings and scenery, others have differentiated reasons by Island. For example, State Park users on O'ahu seek famous landmarks. On the Hawai'i Island, Maui, and Kaua'i, users are more active. While Hawai'i Island and Maui users are ocean oriented, those on Kaua'i are attracted by hiking and trails.



Base: Total (11,658); O'ahu (5,844); Hawai'i Island (2,027); Maui (717); Kaua'i (3,069)

Q4: What is the main reason for visiting this park?



Park User Motivations by Island (Detail)

More than half of park users visit parks for outings with family/friends or for scenic views. On Kaua'i, more park users engage in hiking/walking. Maui and Hawai'i Island park users are motivated by ocean/water activities and O'ahu park users by famous landmarks.

	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
Outing with family/friends	31%	29%	24%	25%
Scenic views	25%	20%	24%	28%
Famous landmark	11%	7%	11%	7%
Hike trails/walk	7%	6%	10%	18%
Ocean/Water activity	8%	13%	15%	12%
Guided tour stop	7%	9%	6%	4%
See flora/fauna	1%	3%	4%	3%
Party/Celebration	2%	3%	1%	1%
Event by an organization you belong to	1%	2%	0%	0%
Use restrooms	1%	5%	1%	0%
Overnight/Camping	1%	0%	1%	1%
Festival/Entertainment/Special Events	1%	0%	0%	0%
Other	4%	4%	3%	1%

Q4: What is the main reason for visiting this park?

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.



Park User Motivations by Island and Segment

The top motivation for residents to visit parks on the Hawai'i Island, Maui, and Kaua'i is outing with family/friends. For O'ahu it is the scenic views. For out-of-state visitors, the main motivations are scenic views and outing with family/friends.

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi- dents	Visi- tors	Resi- dents	Visi- tors	Resi- dents	Visi- tors	Resi- dents	Visi- ors
Outing with family/friends	38%	26%	38%	21%	36%	20%	43%	23%
Ocean/Water activity	15%	3%	13%	14%	23%	13%	28%	10%
Scenic views	46%	33%	7%	30%	7%	29%	9%	30%
Hike trails/walk	7%	6%	10%	3%	10%	10%	10%	19%
Party/Celebration	4%	1%	5%	1%	2%	1%	1%	0%
Guided tour stop	2%	12%	5%	13%	8%	5%	1%	4%
Famous landmark	3%	17%	3%	10%	2%	14%	2%	8%
Event by an organization	2%	0%	4%	1%		0%	1%	0%
Use restrooms	1%	0%	10%	1%	0%	1%	1%	0%
Overnight/Camping	2%	0%	1%	0%	2%		1%	1%
See flora/fauna	1%	1%	1%	4%	3%	5%	1%	4%
Festival/ Ent/ Special Events	2%	1%	0%	0%	1%	0%		
Other	7%	1%	6%	2%	6%	2%	2%	0%

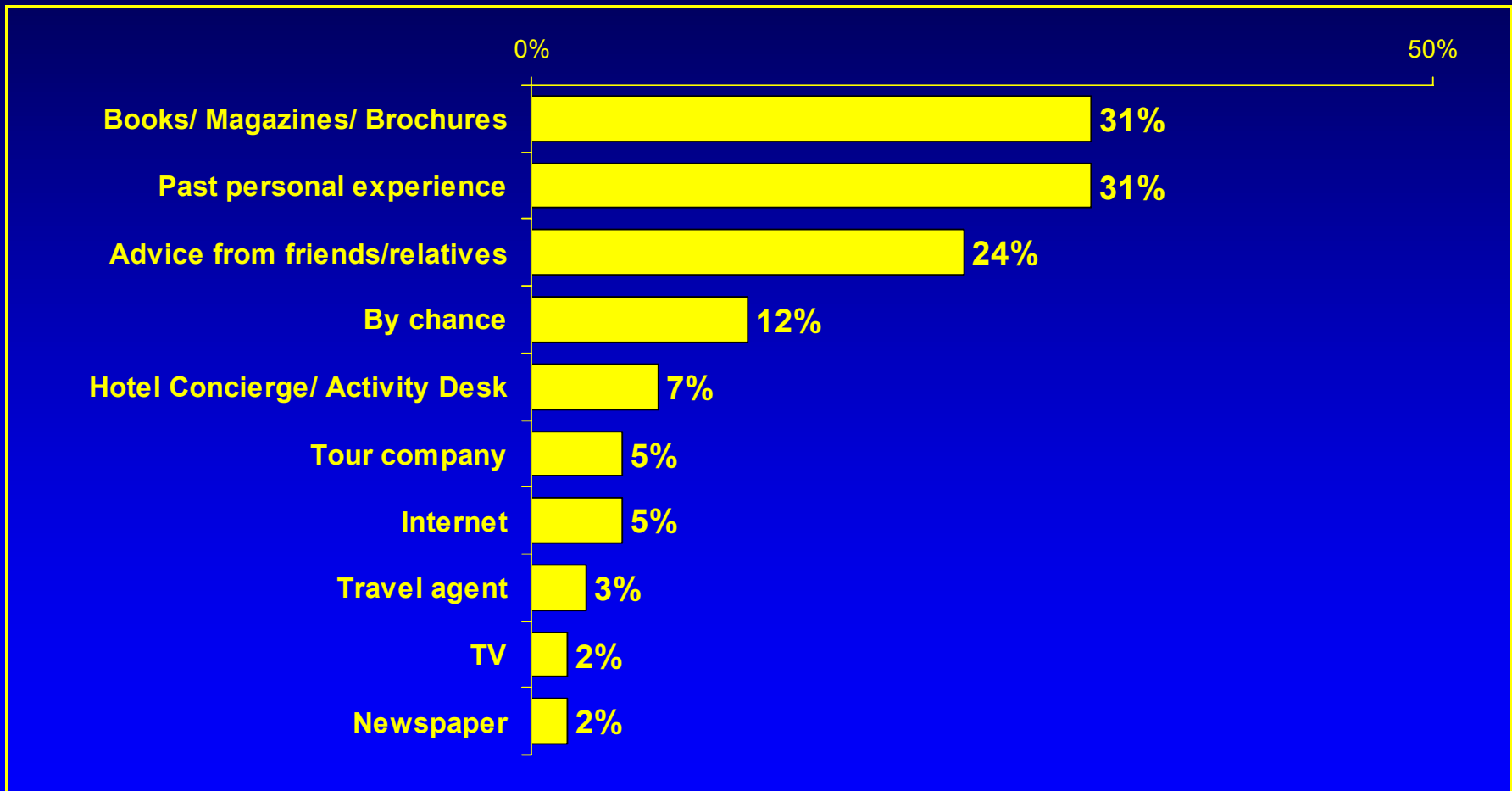
Q4: What is the main reason for visiting this park?

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.



Sources of Information

Printed materials (books, magazines, and brochures) and personal experiences are most frequently used sources of information about State Parks.



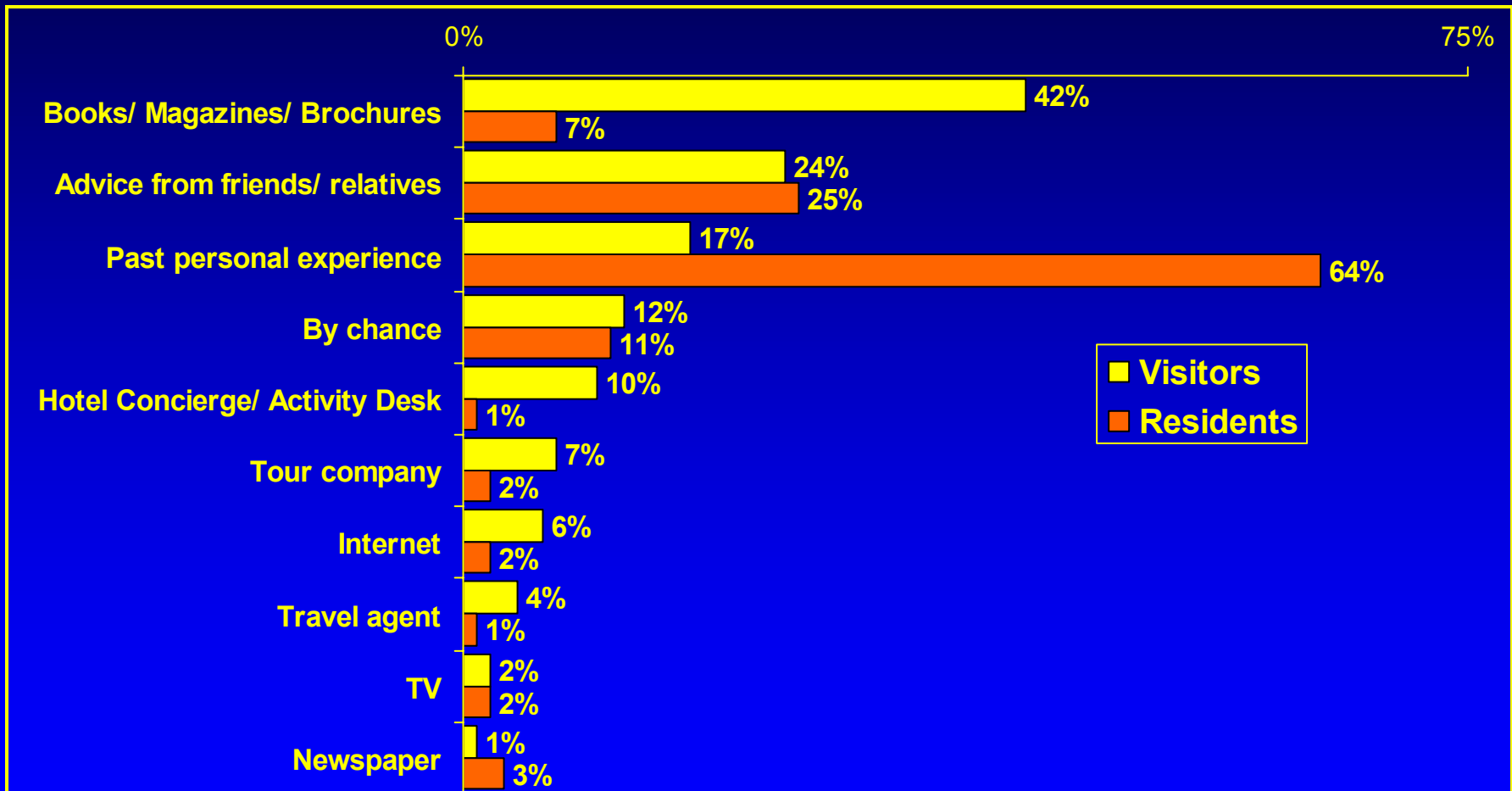
Base: 11,658

Q10: Where did you get information about this park?



Sources of Information by Segment

While residents rely on past experience, out-of-state visitors make park decisions using printed materials and inter-personal advice. The travel trade representatives reach about 1 in 5 out-of-state visitors who use state parks.



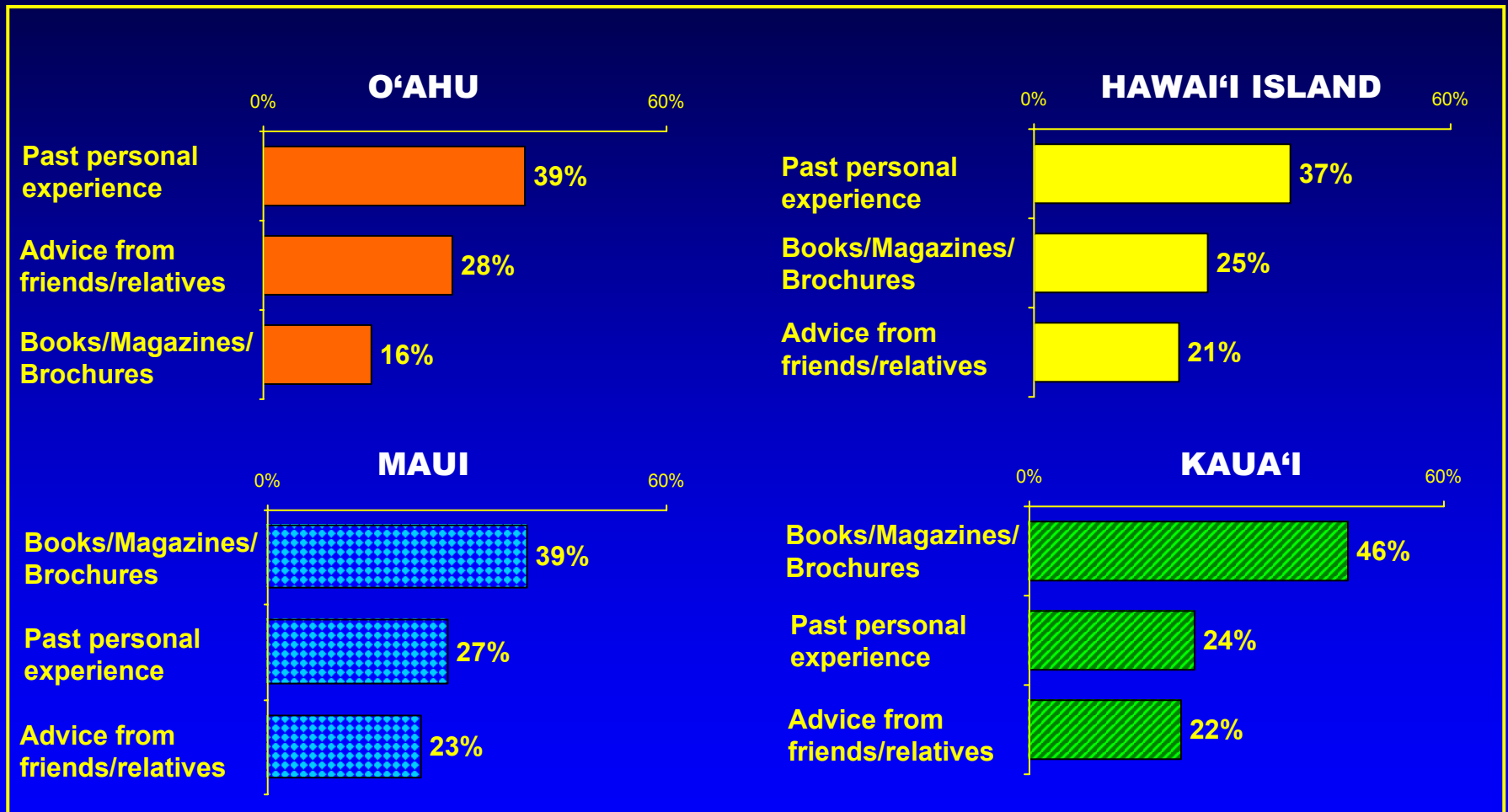
Base: Visitors (8,211); Residents (3,447)

Q10: Where did you get information about this park?



Sources of Information by Island

Park users across all Islands use identical information sources.



Base: Total (11,658); O'ahu (5,844); Hawai'i Island (2,027), Maui (717); Kaua'i (3,069)

Q10: Where did you get information about this park?



Sources of Information by Island and Segment

While differences exist between residents and out-of-state visitors, out-of-state visitors across the Islands tend to use similar sources of information.

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi- dents	Visi- tors	Resi- dents	Visi- tors	Resi- dents	Visi- tors	Resi- dents	Visi- tors
Past personal experience	64%	17%	64%	14%	57%	17%	69%	17%
Advice from friends/relatives	28%	28%	23%	19%	25%	22%	19%	23%
By chance	13%	14%	11%	15%	7%	12%	6%	11%
Books/Magazines/Brochures	4%	26%	7%	40%	16%	46%	9%	52%
Newspaper	3%	2%	2%	2%	4%	0%	1%	1%
Tour company	2%	11%	3%	10%	7%	5%	0%	4%
TV	2%	2%	2%	2%	4%	2%	2%	2%
Internet	1%	5%	1%	3%	4%	6%	2%	7%
Hotel Concierge/Activity Desk	0%	8%	1%	8%	4%	12%	2%	11%
Travel agent	1%	5%	1%	4%	1%	2%	1%	3%
Base	2,264	3,580	711	1,316	187	530	285	2,784

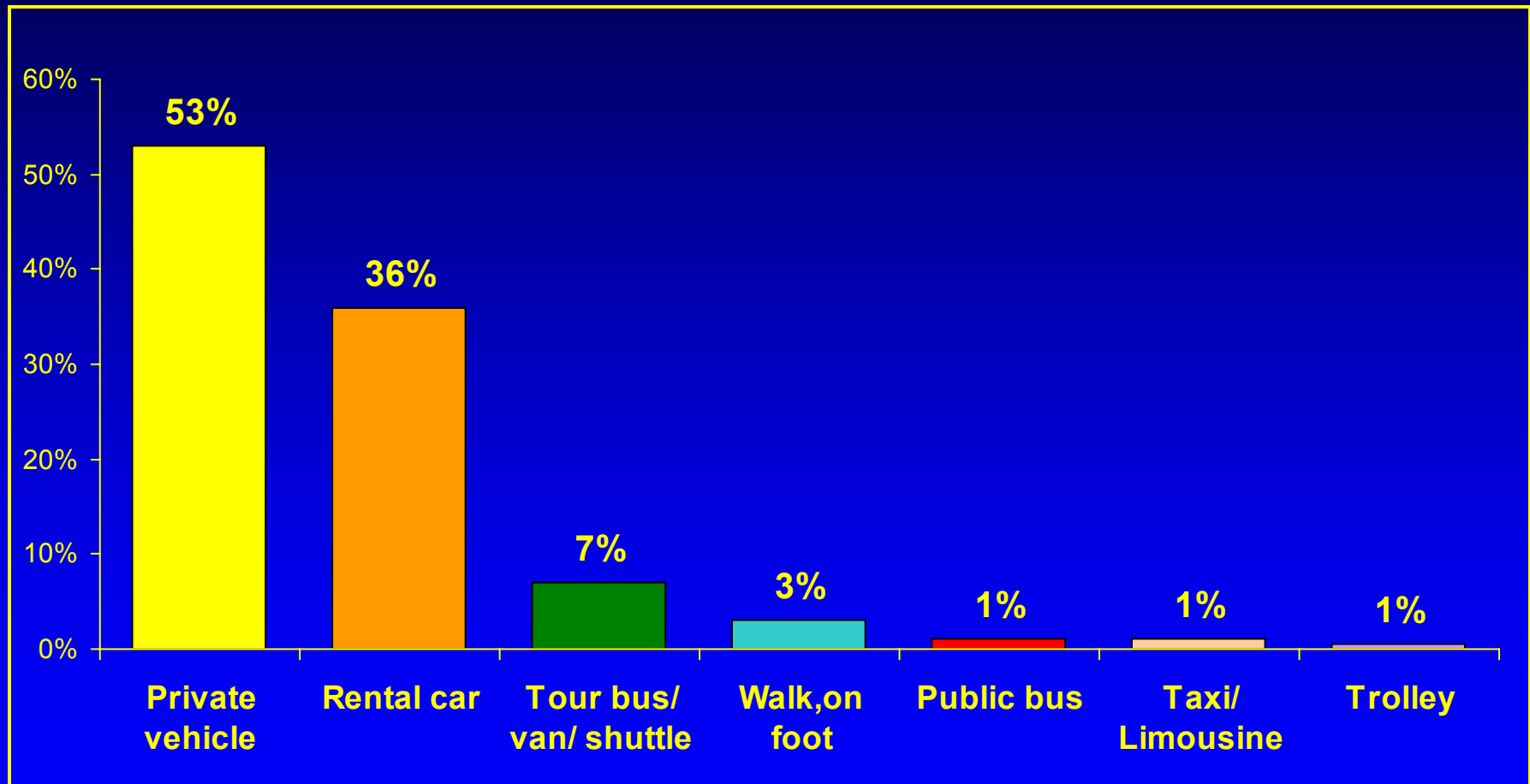
Q10: Where did you get information about this park?

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.



Transportation Sources

Park users tend to arrive by private rather than public transportation.



Base: 11658

Q11: To get to this park today, which means of transportation did you see?



BEHAVIORAL ANALYSIS



Transportation Source by Island and Segment

While rental cars are the most used source of transportation across all Islands, public transportation is used more by out-of-state visitors on O'ahu.

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi-dents	Visi-tors	Resi-dents	Visi-tors	Resi-dents	Visi-tors	Resi-dents	Visi-tors
Private vehicle	86%	37%	86%	44%	85%	38%	84%	38%
Rental car	2%	34%	5%	40%	6%	56%	12%	56%
Walk, on foot	9%	4%	5%	1%	2%		2%	1%
Tour bus/van/shuttle	2%	16%	3%	14%	5%	5%	1%	5%
Public bus	1%	5%	0%	1%		0%		
Taxi/Limousine	0%	3%	0%	0%	1%	1%	0%	0%
Trolley	0%	2%			1%		0%	
Base	2,264	3,580	711	1,316	187	530	285	2,784

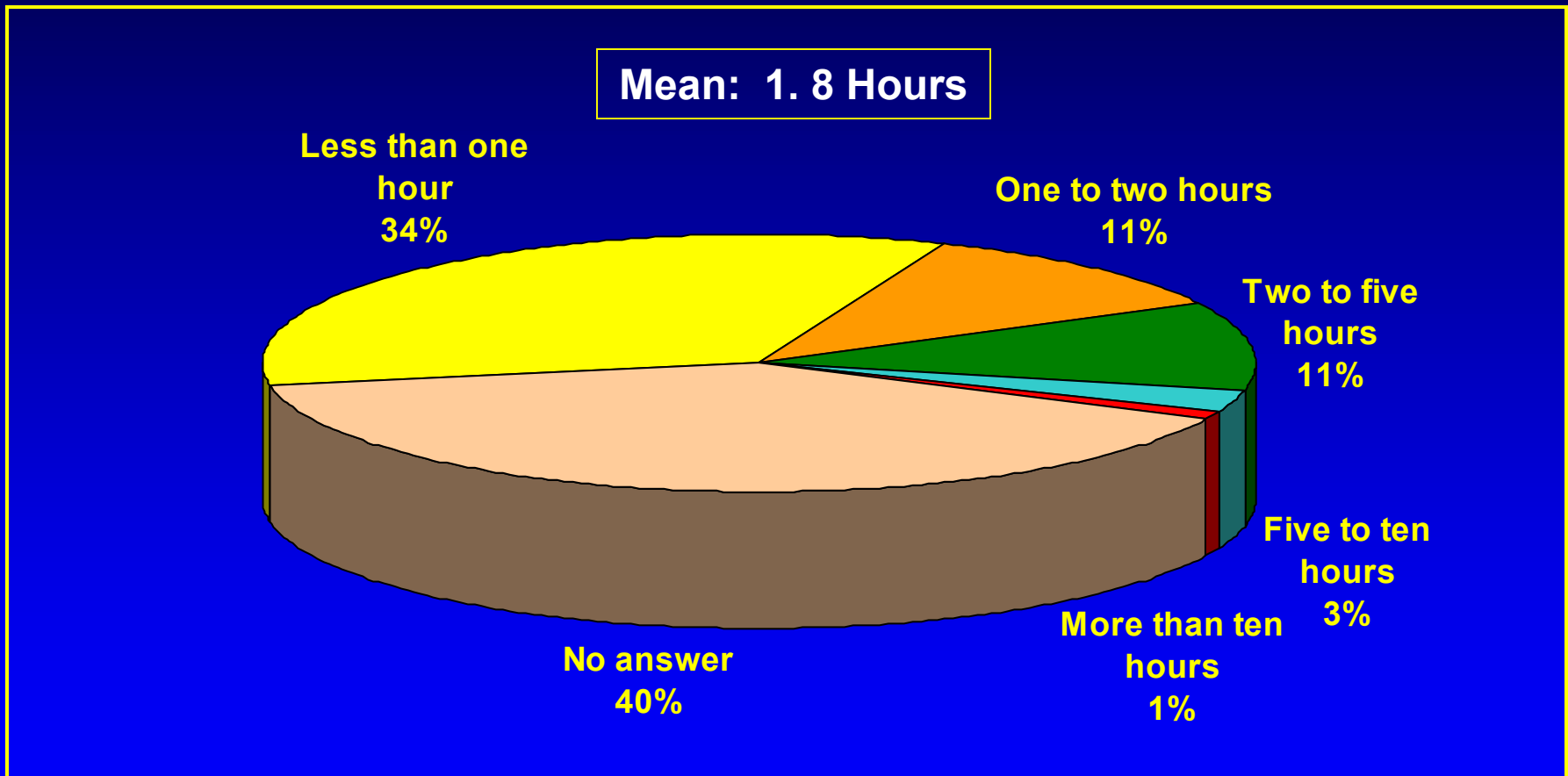
Q11: To get to this park today, which means of transportation did you see?

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.



Length of Stay at Park

On average, park users tend to visit a park for just under two hours. However, one-third stay less than one hour and these short visits tend to be tour stops.



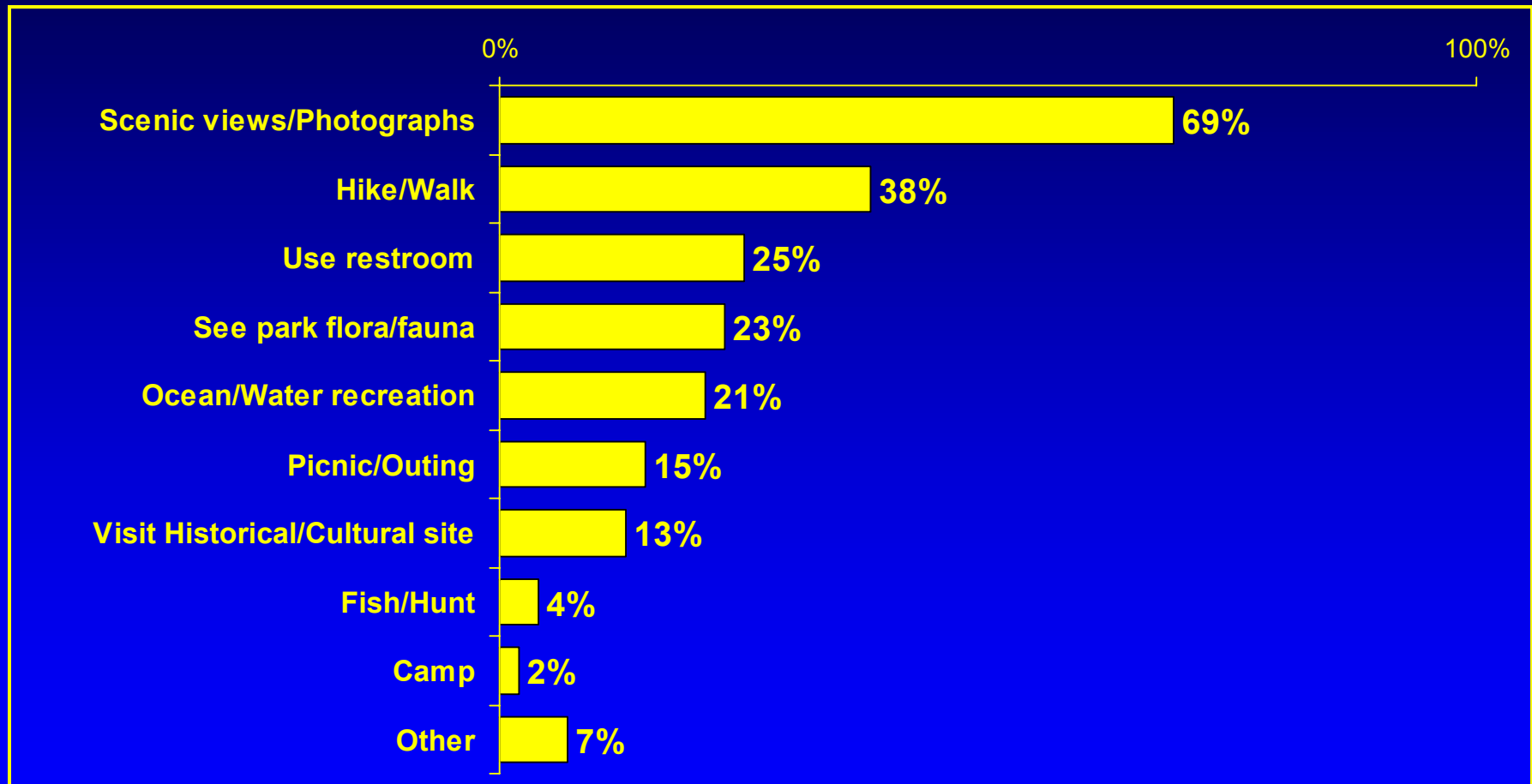
Base: 11658

Q5: Today, how long did you stay at the park?



Park Activities

More than 2 in 3 park users report enjoying the scenery, and one quarter report enjoying the natural flora and fauna. More than one-third hiked or walked and one fifth undertook ocean recreation.



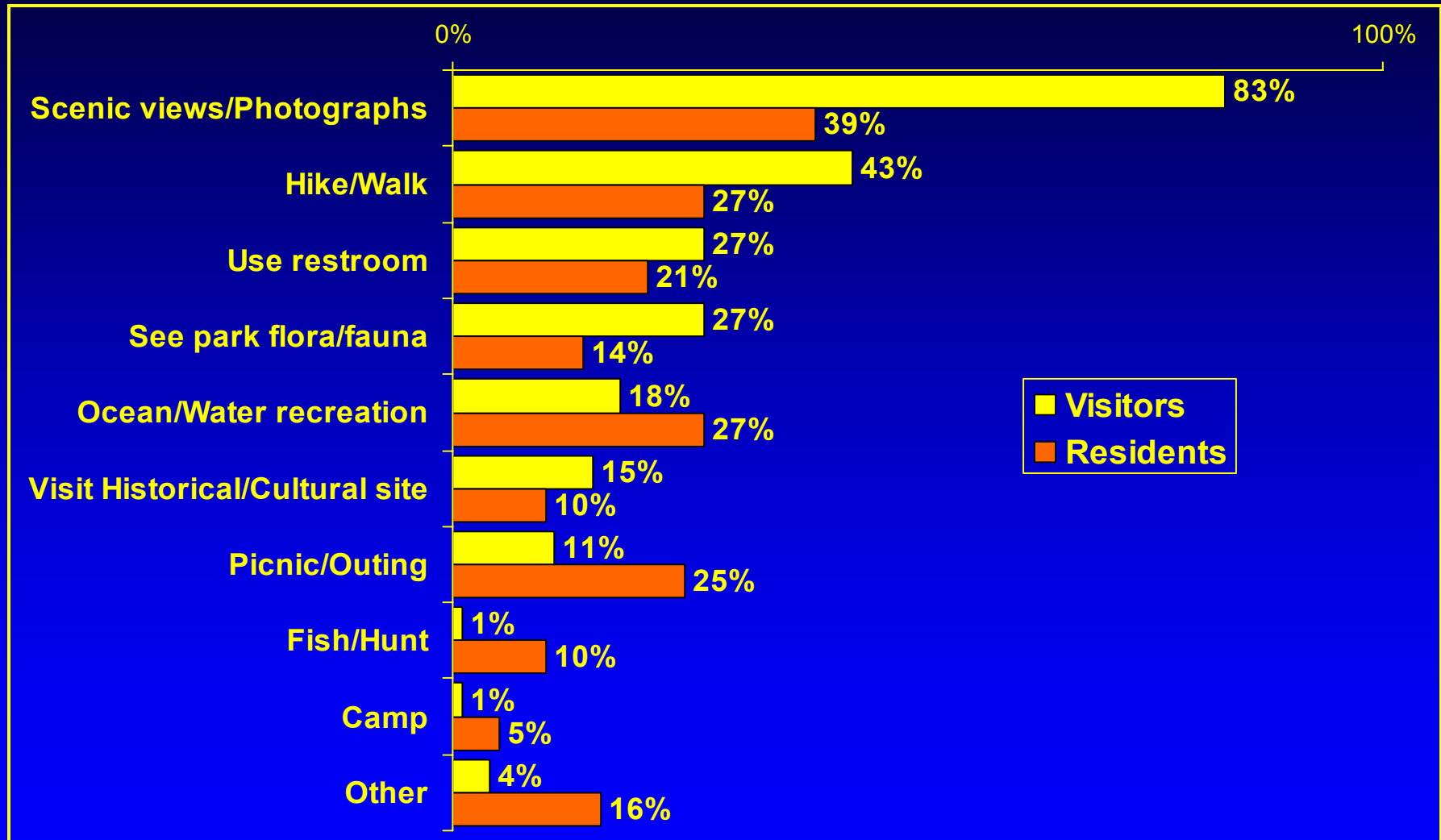
Base: 11658

Q6: What did you actually do during the today's visit?



Park Activities by Segment

Segmentation analyses show interesting behavior differences among park users. While residents are more oriented toward ocean activities and picnics, out-of-state visitors prefer hiking/walking and the natural beauty.



Base: Residents (3,447); Visitors (8,211)

Q6: What did you actually do during the today's visit?

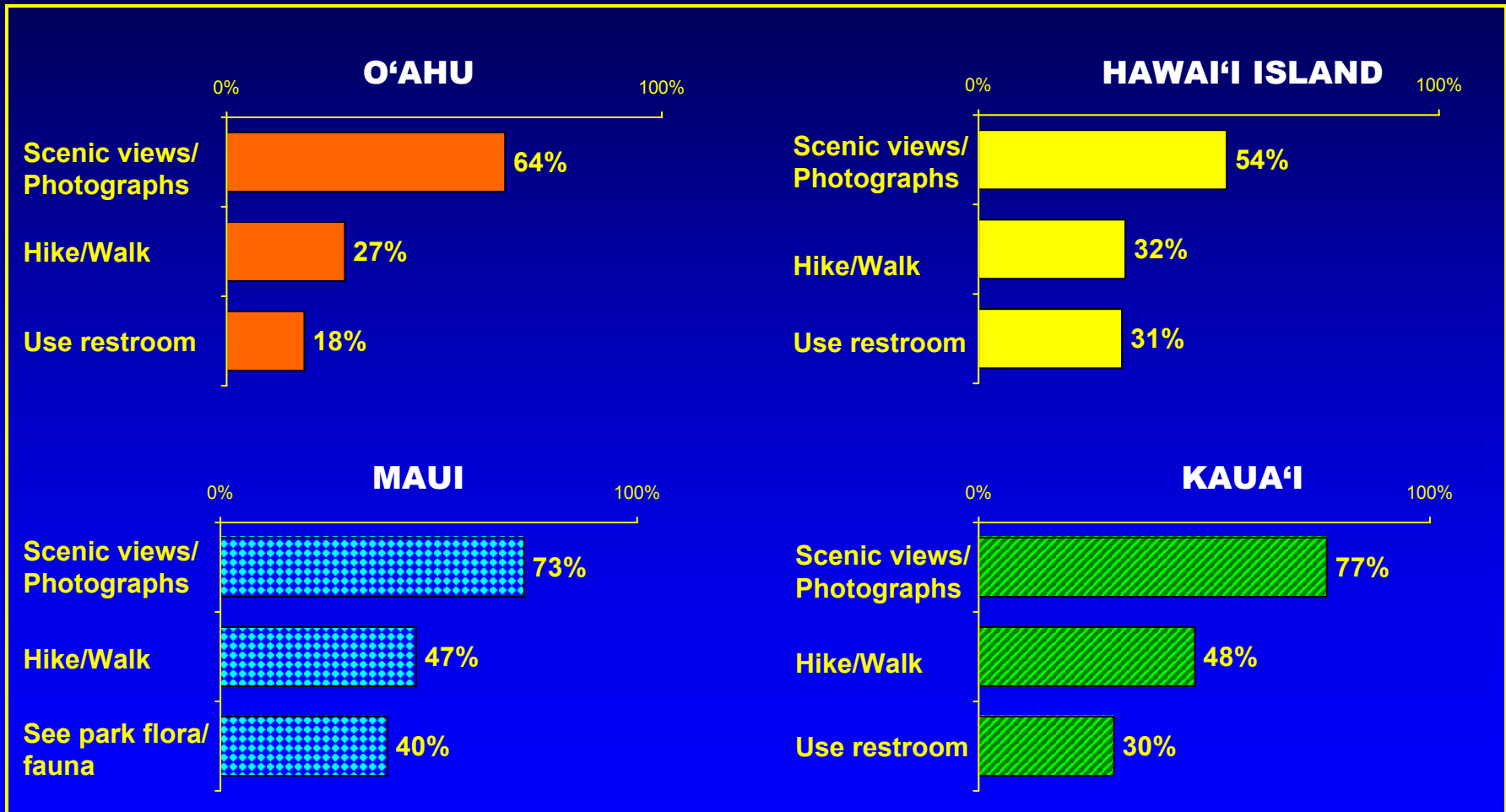


OmniTrak Group Inc.

HAWAII TOURISM AUTHORITY (4023)

Park Activities by Island

The majority of park users enjoy scenic views/photographs and hike/walk during their visit. For parks on O'ahu, the Hawai'i Island, and Kaua'i, restroom usage is the third most important activity. Seeing park flora/fauna is the third most important activity on Maui.



Base: Total (11,658); O'ahu (5,844); Hawai'i Island (2,027); Maui (717); Kaua'i (3,069)

Q6: What did you actually do during the today's visit?



Park Activities by Island

More than 70% of park users on Kaua'i and Maui view the scenery or take photographs and around 50% of them hike/walk. On O'ahu and the Hawai'i Island, more than half of the park users take in scenic views/photographs, and approximately 30% of them hike/walk. Restroom usage is equally important on the Hawai'i Island, Maui, and Kaua'i. For Maui, seeing flora/fauna is the third most important activity.

	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
Scenic views/Photographs	64%	54%	73%	77%
Hike/Walk	27%	32%	47%	48%
Use restroom	18%	31%	30%	29%
Picnic/Outing	15%	16%	16%	16%
Visit Historical/Cultural site	14%	8%	17%	12%
Ocean/Water recreation	13%	22%	32%	24%
See park flora/fauna	12%	22%	40%	27%
Fish/Hunt	4%	2%	1%	6%
Camp	3%	1%	1%	3%
Other	9%	10%	8%	5%

Q6: What did you actually do during the today's visit?

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.



Park Activities By Island and Segment

For out-of-state visitors, scenic views/photographs and hike/walk are the top two activities on all Islands. Visiting historical/cultural sites is the third most important activity on O'ahu, while using the restroom is the third most frequent on the Hawai'i Island and Kaua'i, and seeing park flora/fauna is the third on Maui. For residents, the top two activities on O'ahu are scenic views/photographs and picnic/outing. On Kaua'i, they are scenic views/photographs and fish/hunt. Using restroom is the most frequent on the Hawai'i Island, followed by scenic views/photographs. Ocean/water recreation and scenic views/photographs are the top two activities on Maui. The third most important activity for residents on all Islands is hike/walk.

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi- dents	Visi- tors	Resi- dents	Visi- tors	Resi- dents	Visi- tors	Resi- dents	Visi- tors
Scenic views/ Photographs	40%	85%	29%	75%	46%	81%	38%	83%
Hike/Walk	24%	31%	28%	36%	42%	50%	29%	51%
Picnic/Outing	26%	5%	24%	10%	26%	13%	22%	15%
Ocean/Water recreation	22%	5%	24%	21%	51%	27%	26%	24%
Use restroom	18%	17%	32%	30%	26%	31%	19%	31%
See park flora/fauna	10%	13%	15%	28%	30%	44%	15%	29%
Visit Historical/Cultural site	10%	18%	7%	9%	14%	18%	8%	12%
Fish/Hunt	7%	1%	4%	1%	2%	0%	32%	2%
Camp	5%	1%	2%	1%	4%	0%	8%	2%
Other	16%	3%	18%	4%	17%	5%	13%	4%

Q6: What did you actually do during the today's visit?

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.

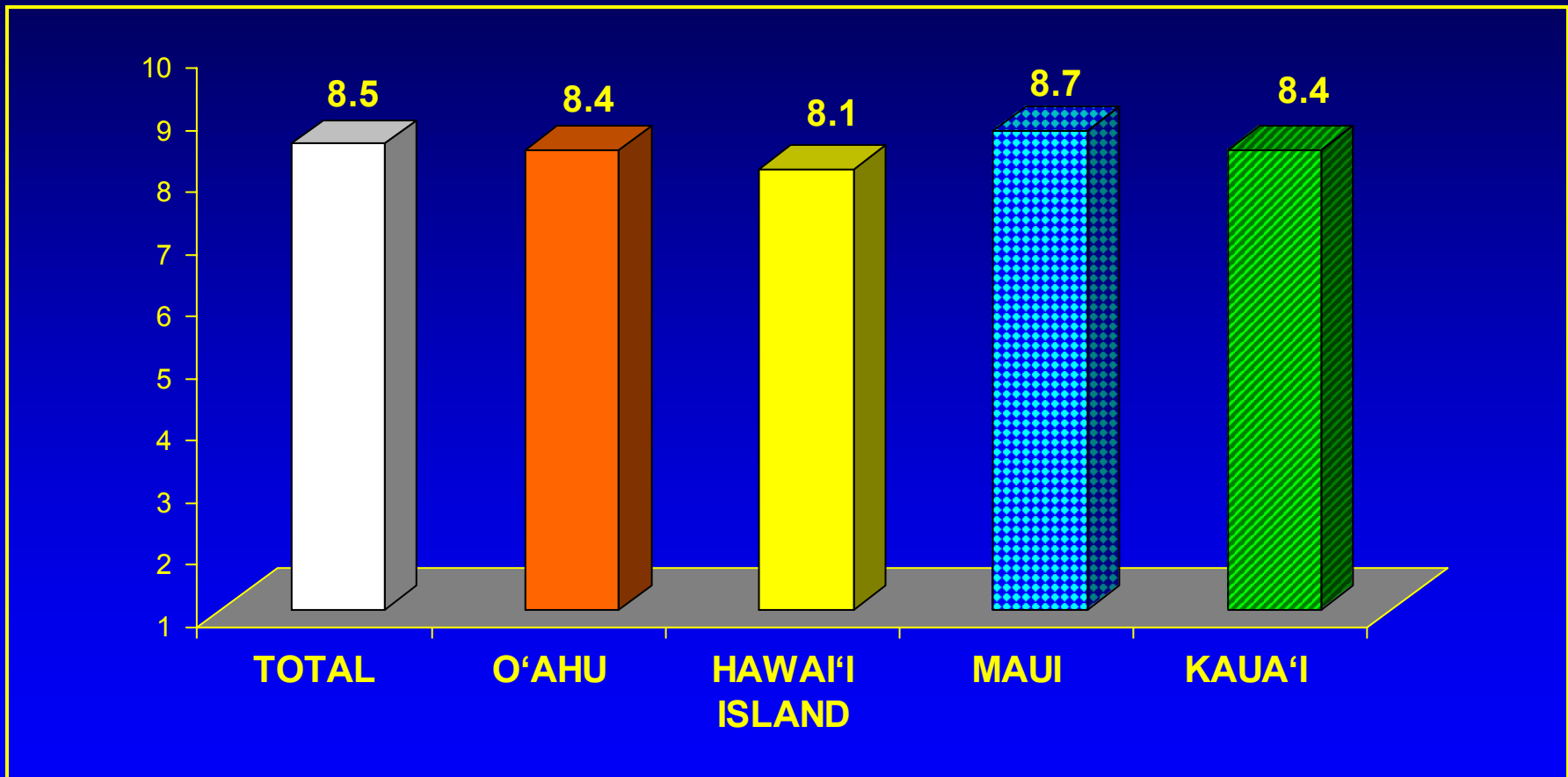


SATISFACTION WITH PARK EXPERIENCE



Satisfaction with Park Experience

Overall, state park users rate their experience highly --- 8.5 on a 10-point scale. While Maui users are even more satisfied, Hawai'i Island park go-ers are less satisfied.



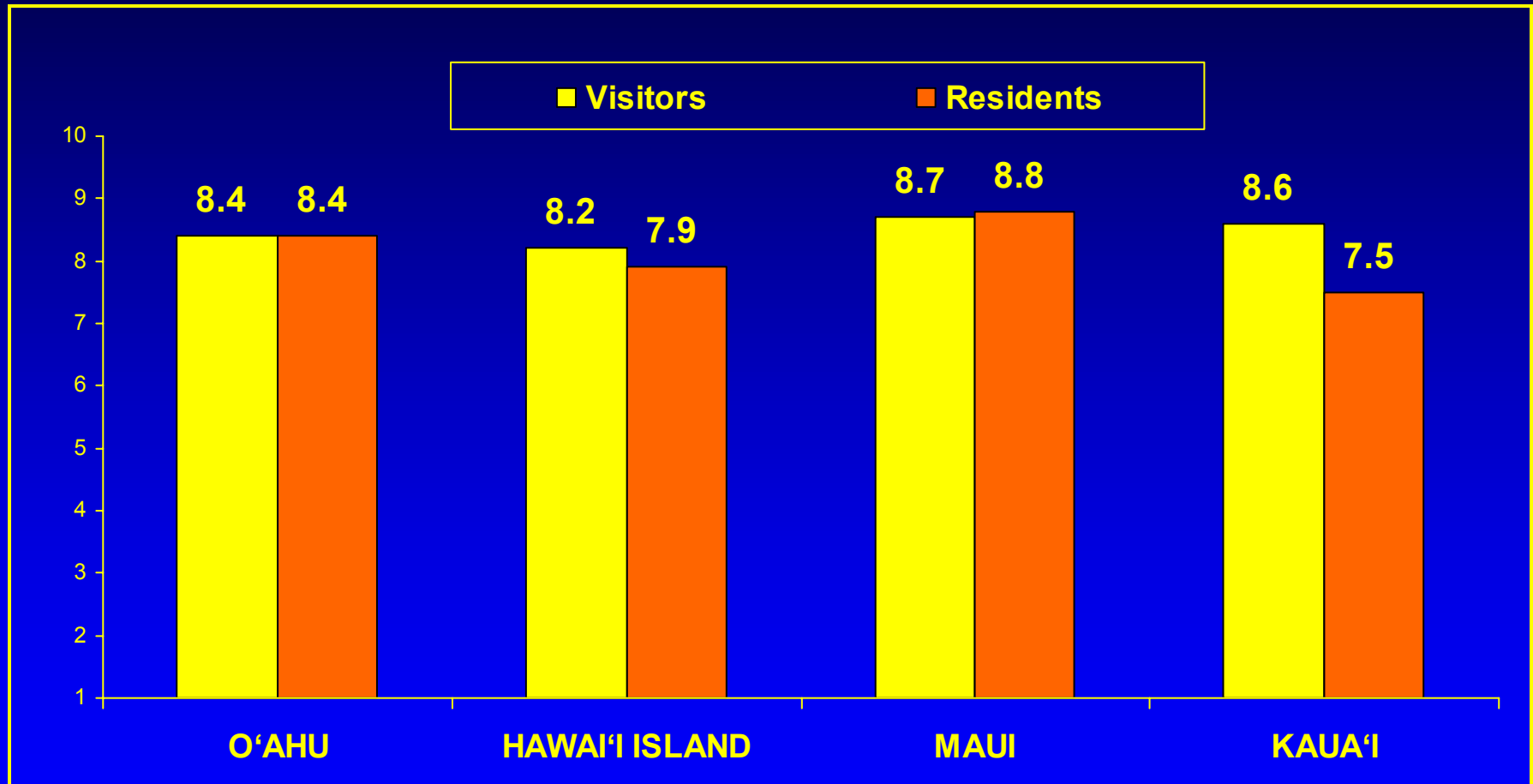
Base: 11,658

Q7: Overall, how satisfied were you with your visit to this park today, if 10 is outstanding satisfaction and 1 is not satisfied at all?



Park User Satisfaction by Segment

On the Hawai'i Island and Kaua'i, residents are substantially less satisfied with their park experience than out-of-state visitors. On O'ahu and Maui, satisfaction levels are comparable.

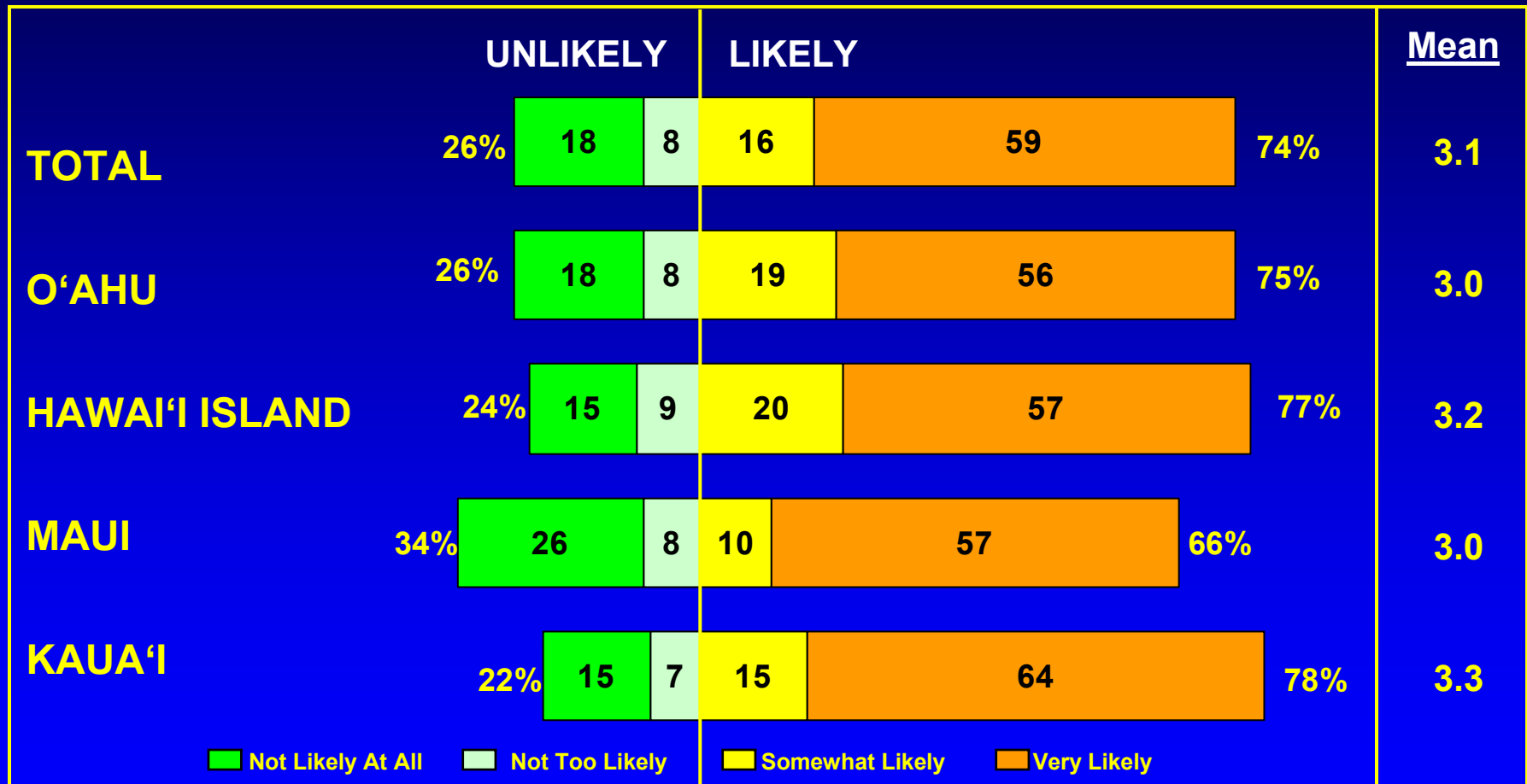


Q7: Overall, how satisfied were you with your visit to this park today, if 10 is outstanding satisfaction and 1 is not satisfied at all?



Likelihood of Recommending

A majority of park users statewide and on each Island are very likely to recommend the park to family or friends. This data reinforces park users' high overall satisfaction.



Base: 11658/5844/2027/717/3069

Q8: How likely are you to recommend a visit to this park to other family or friends? Are you...



OmniTrak Group Inc.

HAWAI'I TOURISM AUTHORITY (4023)

Likelihood of Recommending by Island & Segment

Across all Islands, residents are more likely to recommend State Parks than out-of-state visitors.

	O'AHU		HAWAII ISLAND		MAUI		KAUA'I	
	Resi- dents	Visi- tors	Resi- dents	Visi- tors	Resi- dents	Visi- tors	Resi- dents	Visi- tors
LIKELY	79%	71%	77%	76%	80%	62%	82%	77%
Very likely	58	55	69	55	72	52	64	64
Somewhat likely	21	17	18	22	7	10	19	14
UNLIKELY	22	28	23	24	20	38	18	23
Not likely at all	14	21	15	14	18	28	11	16
Not too likely	8	8	8	10	2	10	7	7

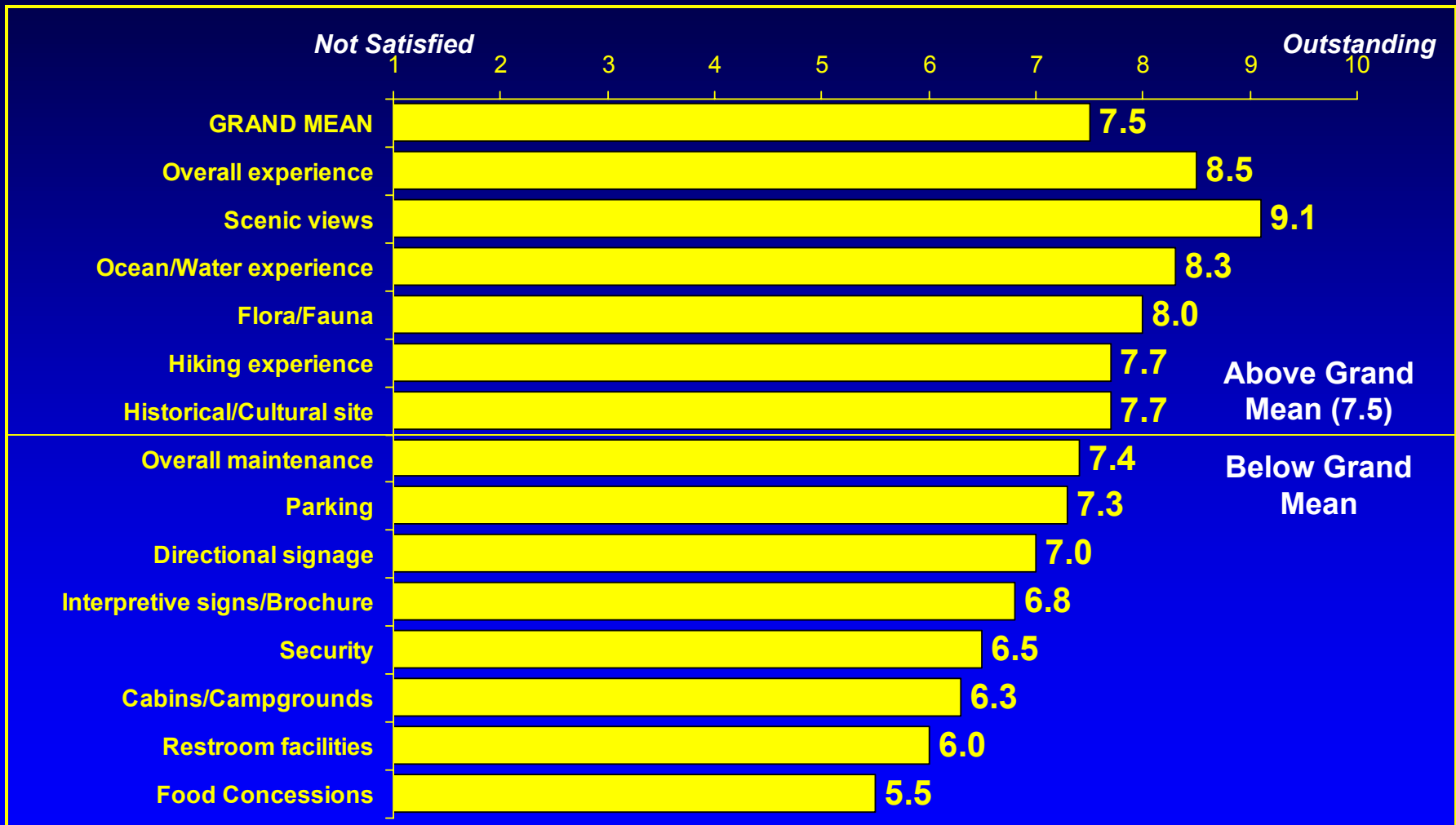
Q8: How likely are you to recommend a visit to this park to other family or friends? Are you...

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.



Attribute Satisfaction

Park go-ers are generally more highly satisfied with the natural elements in State Parks than with what should be value-added attributes. The natural scenery, habitat, and hiking experience rate well, while comfort facilities and security border on dissatisfaction.



Base: 11,658

Q9: Thinking about your park experience today, on a scale of 1 to 10, with 10 being outstanding satisfaction and 1 being not satisfied at all, how satisfied were you with each of the following?

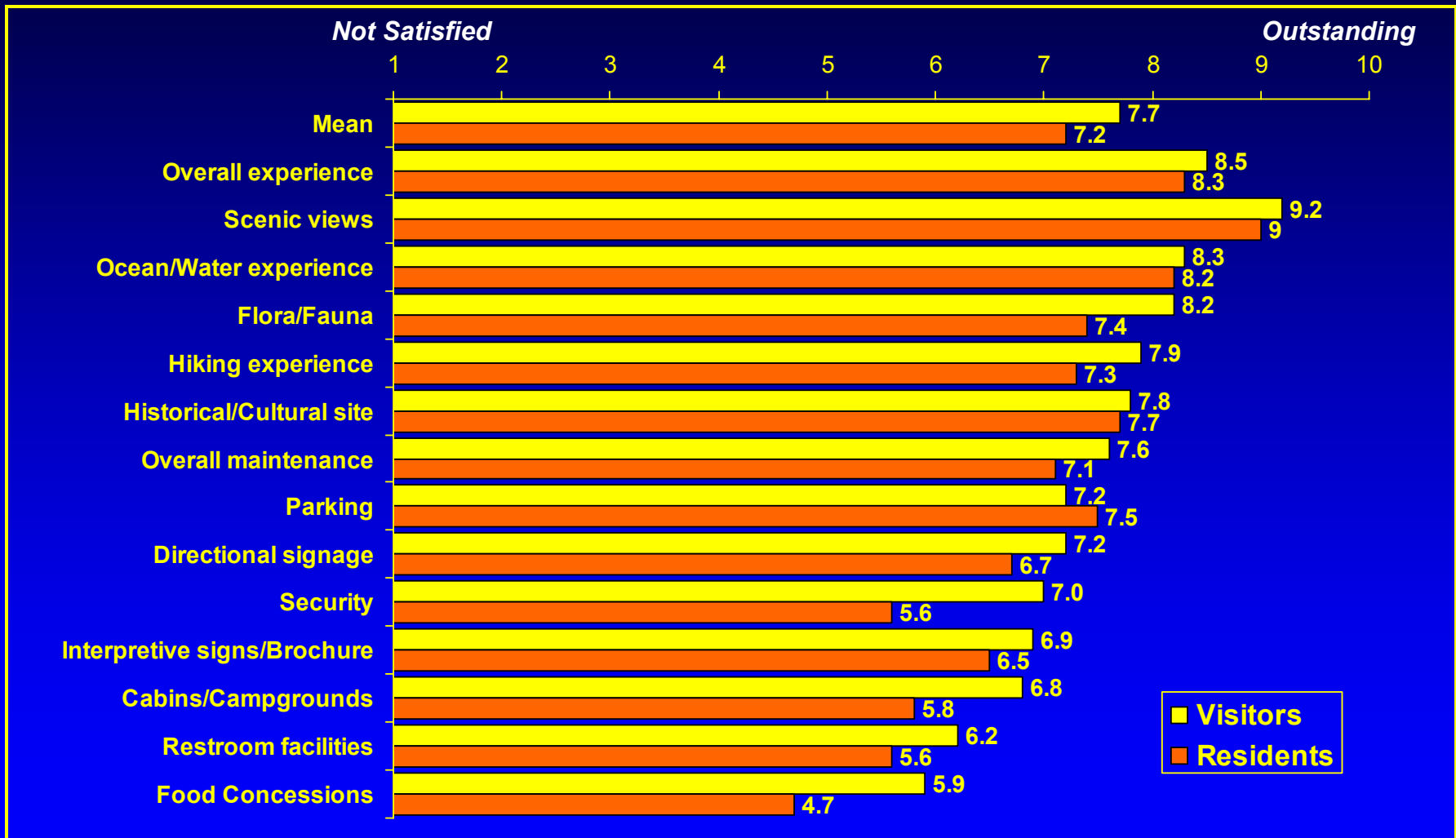


OmniTrak Group Inc.

HAWAII TOURISM AUTHORITY (4023)

Attributes Satisfaction by Segment

Compared to residents, visitors are generally more satisfied with all the attributes in State Parks, except for parking. Both residents and visitors are more satisfied with the natural elements in State Parks than with the value-added attributes.



Q9: Thinking about your park experience today, on a scale of 1 to 10, with 10 being outstanding satisfaction and 1 being not satisfied at all, how satisfied were you with each of the following?



Attribute Satisfaction by Island

On most attributes, Maui and Kaua'i users rate State Parks higher than O'ahu and Hawai'i Island park users. While facility ratings are low across the State, they are even lower on the Hawai'i Island where parks are more remote.

	O'AHU	HAWAI'I ISLAND	MAUI	KAUA'I
Overall experience	8.4	8.1	8.7	8.4
Scenic views	9.0	8.9	9.4	9.2
Ocean/Water experience	8.0	8.1	8.7	8.4
Flora/fauna	7.5	7.7	8.4	8.3
Hiking experience	7.3	7.3	7.9	8.0
Historical/Cultural site	7.8	7.2	8.0	7.6
Parking	7.8	7.6	7.7	6.6
Overall maintenance	7.7	6.7	7.9	7.1
Directional signage	7.1	6.8	7.3	6.8
Interpretive signs/Brochure	7.0	6.1	7.0	6.8
Security	6.3	6.1	6.7	6.7
Cabins/Campgrounds	6.4	5.7	7.0	6.2
Restroom facilities	6.3	5.6	5.7	5.9
Food Concessions	5.3	5.2	6.0	5.5

Q9: Thinking about your park experience today, on a scale of 1 to 10, with 10 being outstanding satisfaction and 1 being not satisfied at all, how satisfied were you with each of the following?

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.



Attribute Satisfaction by Island and by Segment

While out-of-state visitors rate State Parks higher than residents, both segments are equally dissatisfied with restroom facilities and food concessions.

	O'AHU		HAWAI'I ISLAND		MAUI		KAUA'I	
	Resi- dents	Visi- tors	Resi- dents	Visi- tors	Resi- dents	Visi- tors	Resi- dents	Visi- tors
Overall experience	8.4	8.4	7.9	8.4	8.8	8.8	8.2	8.7
Scenic views	8.9	8.9	9.0	8.9	9.5	9.3	9.4	9.4
Ocean/Water experience	8.0	8.0	8.2	8.0	9.0	8.4	8.7	8.5
Parking	7.8	7.9	7.8	7.8	7.3	8.1	6.9	6.7
Historical/Cultural site	7.4	7.7	7.3	7.3	8.1	8.0	7.9	7.6
Flora/Fauna	7.1	7.3	7.6	8.3	8.3	8.3	7.9	8.5
Hiking experience	7	7.6	7.5	7.3	8.2	7.6	8.2	8.3
Overall maintenance	7.2	7.8	6.3	7.3	7.7	8.1	6.5	7.5
Directional signage	6.7	7.6	6.8	7.3	7.5	7.5	6.3	7
Interpretive signs/Brochure	6.6	7.2	6.1	6.5	7.0	7.2	6.4	6.7
Cabins/Campgrounds	6.2	6.6	5.3	6.3	5.8	7.2	6.7	6.9
Restroom facilities	5.8	6.4	5.5	5.8	5.6	5.9	5.4	6.3
Security	5.7	6.9	5.6	6.8	6.1	7.2	5.6	7.2
Food Concessions	4.7	5.7	4.8	5.7	5.6	6.0	5.5	5.9

Q9: Thinking about your park experience today, on a scale of 1 to 10, with 10 being outstanding satisfaction and 1 being not satisfied at all, how satisfied were you with each of the following?

Note: Shaded signifies a statistically significant difference across columns at the 95% level of confidence.

